

**'TO WORK OR NOT TO WORK? – OLDER WORKERS AND THE
CIRCUMSTANCES, BARRIERS AND MEANINGS OF EMPLOYMENT
IN TAIWAN**

By

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ABSTRACT

The ageing labour force has become an unavoidable issue in the Taiwanese labour market. While encouraging the employment of older people has become a crucial policy target in most advanced countries, labour participation rates for older Taiwanese, as well as public intervention, still remain at a fairly low level. Moreover, little attention has been paid to understanding why older Taiwanese are consistently less likely to retain work.

By using mixed-methods, this thesis seeks to explore the reasons why there are low labour participation rates among older Taiwanese in relation to individual and socio-economic contexts. Two distinct groups and problematic employment circumstances are identified here: Group 1: 'low employment rates and low incomes', including those aged 55 and over, women and the low educated; Group 2: 'high employment rates and high unemployment rates', including men, the middle and highly educated, single or divorced and living in urban or manufacturing areas.

Moreover, it is recognised that employment barriers in relation to human capital/working ability/employability are likely to be significant factors that reduce labour participation rates for older Taiwanese. Most significantly, it finds that there exists a weak 'to-work' social attitude but a strong 'not-to-work' social attitude in Taiwan. As a result, the importance and meanings of employment for older Taiwanese are undervalued and older people's employment opportunities are overwhelmingly limited.

Thus, it is suggested that the Taiwanese government's awareness and responsibility to increase the employment opportunities for older workers should be addressed. It not only has to address relevant human capital issues but also has to take the social attitudes towards the employment of older Taiwanese into policy consideration. In addition, by taking lessons from the Active Labour Market Policy in advanced countries, the current public employment services need to be reformed, such as by integrating long term and short term programmes; creating direct incentives and essential sanctions for both job-seekers and employers; or increasing flexibility upon service delivery.

Overall, it is certain that a specific employment service programme for older people is required. However, as has been questioned, the effectiveness of a one-size-fits-all employment policy and labour market approach across nations should be reconsidered. Therefore, policy must consider how to reflect on local contexts as well as the diverse public attitudes.

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1 INTRODUCTION

1.1 Ageing in Taiwan and older Taiwanese' employment

Taiwan has an ageing population and it is predicted that Taiwanese society will become one of the oldest countries in the world. By 2051, those aged 65+ will reach 37% of the population, or half of the 15-64 age population in Taiwan (CEPD, 2006; DGBAS, 2010).

Consequently, by 2051, the (so-called) dependency ratio in Taiwan (72%) will be almost as high as that of Japan (74%), and higher than those of the U.K (38%), China (38%), Hong Kong (58%), and South Korea (63%). Moreover, the rate of increase in the dependency ratio in Taiwan will be the largest among East Asian countries, with 60% 'dependent' on 12 % of the population in 2000 rising to 72% by 2050.

Moreover, the age of mandatory retirement has remained relatively young in Taiwan: 65 for civil servants and 60 for other employees (Raymo and Corman, 1999:225, Yoon and Hendricks, 2006:14); and a number of Taiwanese workers can even claim their pensions by the age of 55 (BLI, 2009). As for older Taiwanese Labour Force Participations Rates (LFPRs), statistics show that the LFPRs for both males and females are amongst the lowest when compared to advanced Western and East Asian countries, such as the U.K., Sweden, Singapore and South Korea (ILO, 2011; DGBAS, 2011). However, as a result of the baby boomers appearing in the late 1960s, the number of those aged 25-64 has continued to grow; thus, as an official report warned, this may cause the public to underestimate the risks of the coming labour force shortage (DGBAS, 2011).

As for the established employment policies and services in Taiwan, as a result of consistently low unemployment rates from the 1970s, formal employment policy and services did not

fully develop until the first peak of unemployment rates at the end of 1990s. Therefore, the development of an employment policy system can be seen as a relatively new social regime in Taiwan (Chen, 2005a; Hu, 2007).

Within the Public Employment Service System (PESS), a number of employment policies focusing on facilitating disadvantaged populations' employment have been put forward by learning from programmes in advanced countries, such as Jobcentre Plus in the UK, W/O/R/K centre (one-stop package service) in the US, and employment services programmes for disadvantaged workers in Sweden, Australia, South Korea, Japan, New Zealand, among others (Research Development and Evaluation Commission Executive Yuan, 2008). These countries' experiences are currently used in the PESS; for instance, job-seeking allowances, case managers for disadvantaged populations, an internet job-seeking system, three-in-one employment service windows alongside a number of training schemes. Additionally, 'having a job first' (job-first policies) by either frequently job-matching or providing short-term working opportunities in the public sector has also been adopted (BEVT, 2013).

With regard to relevant research in Taiwan, a number of researchers have addressed the effects of population ageing; for instance, the maintenance of older people's financial security (Zheng and Huang, 2006; Fu, 2005); employers' perceptions towards an ageing labour force (Cheng, 2007); or the impact of an ageing populations on society and older Taiwanese life styles (Yeh, 2005). According to Cheng (2007), the majority of Taiwanese employers prefer to recruit young foreign workers or to commission some part of their business rather than to employ older Taiwanese despite the ageing population. One survey

employed the notion of 'successful ageing' and 'active ageing' to explore how these applied to the perspectives of older Taiwanese (Hsu, 2007). In addition, concerning the development of human resources in an ageing society, Huang and Shan (2007) suggest that older Taiwanese could become an employable labour force in the service sector. However, this research did not consider the potential difficulties which could prevent older Taiwanese from working in services.

It is likely that remaining in work might not been seen as a crucial activity among older Taiwanese elders. Instead of working in old age, it is generally recognised that relying on children's support has been seen as the most popular option for security in later life (Hermalin et al., 2002; Bartlett and Wu, 2000; Biddlecom et al., 2002). As researchers have shown, staying in work has been identified as less important for successful ageing for older Taiwanese. By contrast, being physically independent and having good relationships with their children are the primary concerns (Hsu and Chang, 2004). Regarding ways to tackle challenges derived from greater life expectancy, Yeh's (2005) analysis suggests maintaining older social capital, ensuring family support, creating opportunities to participate in voluntary work and enhancing positive attitudes in among older Taiwanese. Apart from engaging in voluntary work, Yeh's suggestions focus on how to help older Taiwanese rest in later life.

In terms of the barriers to employment for older Taiwanese, a number of characteristics, such as ageism, low education, low skills and income considerations, have lowered the possibility of employment of older job seekers (e.g. Ding, 2009; Xue, 2000; BEVT, 2008; Kuo, 2005). Moreover, the causes of unemployment among older people are often considered to

be skills issues associated with a changing labour market structure (e.g. Xin et al., 2002; Zou, 1998; BEVT, 2008; Jiang, 2001). Older people's attitudes have also been raised in debates; some of the above researchers have indicated that, as a result of the changing labour market structure, the personal expectations of later jobs are hard to satisfy for older Taiwanese. However, some have blamed the lack of flexibility of older unemployed workers in both the type of work and their expected incomes, or their indulgence in their past achievements at work (e.g. BEVT, 2008; Kuo, 2005; Ding, 2009). For example, in a locally published journal, a senior government officer has suggested that older job seekers should bear in mind that their skills are out-of-date, so they should accept any available job rather than insisting on their personal expectations (Kuo, 2005:24). It might be argued that this 'blaming' could provide an easy excuse for employers not to treat their older employees equally.

With respect to factors which affect the opportunities of older people or result in low labour participation rates, current Taiwanese researchers have barely adopted comprehensive points of views to explore the determinants of older people's employment. Instead, they have simply focused on either the effects of individual factors or economic changes (e.g. Xue, 2000; Tseng, 2002; Chang and Lee, 2001). Moreover, as the literature states, as a result of limited political attention being paid to the employment issues of older people, the establishment of employment services for this group has significantly lagged behind demand (e.g. Chou, 2006; Chou and Tsai; 2006). Consequently, so far, there is not any specific employment service programme established for the older population within the PESS. In practice, the older population is seen part of the general disadvantaged population which is distributed to case managers' services, whereas the employment services for disabled

people, women, younger job-seekers and aboriginal populations have separate arrangements within the PESS (BEVT, 2013).

1.2 Meanings of older people's employment in different contexts

In many advanced Western countries, public policies and meanings given to older people's employment have significantly shifted alongside changing socio-economic contexts and ageing populations. From the 1980s onwards, older people have been expected to participate in economic activities for longer than before. For instance, "productive ageing" was put forward (Walker, 2002:123) and along with "economic usefulness" (Estes et al., 2003:70). From the 1990s, the WHO (World Health Organisation) has proposed "active ageing" and has suggested that "older people who retire from work and those who are ill or live with disabilities can remain active contributors to their families, peers, communities and nations" (WHO, 2002:12).

Under these circumstances, attitudes towards retirement have gone through significant changes. The idea of a working life to include an active and positive outlook has been extended as a way to cope with the issues of an ageing labour force, as well as governmental fiscal issues (OECD, 2006; Samorodov, 1999; Maltby and Deuchars, 2005). For example, in Finland, the ageing culture has experienced "a shift from the paradigm of early exit as a social right to a paradigm of work as duty in an individually flexible context" (Gould and Saurama, 2004:89). In practice, the activation of older people's human capital has become the objective of employment policies in the West (Ilmarinen, 2002; Taylor-Gooby, 2008).

A series of policy reforms have been instituted and aimed at older workers. First, Active Labour Market Policies (ALMPs) in combination with welfare-to-work ideologies have been

adopted as an overall guideline towards improving the use and productivity of human capital, particularly for younger and older people (Kluve and Essen, 2006; Carcillo and Grubb, 2006; Lodemel and Trikey, 2001; Wright, 2003; Spies and Berkel, 2001). Second, the mandatory age of retirement has either been gradually increased or been abandoned; and increasingly interventions have focused on older people's employability and motivation (Taylor, 2004; Ilmarinen, 2002). For example, the mandatory age has been abolished in the U.S. and parts of Canada (Marshall and Taylor, 2005:579; Walker, 2002:129); many nations have raised their retirement age, such as in Japan, where it was raised from 60 to 65 (Tillsley and Taylor, 2001:316); to 70+ in Sweden, to 68+ in Italy (Walker, 2002:129).

However, as Arifin (2006: 28) states, "different cultures have different social perceptions of the value and benefits of old age"; thus, while thinking about the meanings of older people's employment, different social and economic contexts could contribute to construct different ideas. An International Labour Office (ILO) report also recognised that because they are relatively younger societies and are more concerned with children or younger populations, many Asian governments are less likely to highly emphasise the employment of older people than Western governments (Samorodov, 1999). As a result of these political and socio-economic contexts, it is argued that Western non-working older people might be identified as a social burden and unaffordable benefit claimants in current Western welfare states (Mullan, 2002:2; Phillipson, 1998:3; Estes et al., 2003:70-71; Reday-Mulvey, 2005:4).

By contrast, the meaning of working in old age might be rather different in Taiwan.

Researchers have shown that remaining economically active in old age is seen as the failure of children or a kind of dysfunction of the older workers' family in Taiwan and other East

Asian nations (see Keith et al., 1994:249; Fan, 2007:162-163). Needless to say, an exploration of the meanings of older Taiwanese's employment as well as the public's and individuals' considerations towards working in old age will take the local context into consideration.

However, it is not known whether these traditional views influence older workers in Taiwan or not. Instead, most researchers have focussed on Taiwanese culture and welfare ideologies in relation to population ageing (e.g. Thornton and Lin, 1994; King, 1996; Ko et al., 2007; Ku, 2001; Chen, 2005a; Chen, 2005b; Chen, 2008; Goldman et al., 2006; Hill and Hwang, 2005; Jordan, 1998). Some of this research has demonstrated that Taiwanese society has been experiencing a series of significant changes in various aspects (e.g. Chen, 2005a; Ko et al., 2007; Hill and Hwang, 2005), and some have urged the government to reform social policies in order to cope with the coming challenges (e.g. Ku, 2001; Chen, 2008). However, it remains unknown how the Taiwanese context relates to meanings of older people's employment and, perhaps, contributes to low labour participation rates among older people.

Above all, it seems that the employment issue has not neither sufficiently attracted the attention of the public and researchers nor attracted many policy interventions in Taiwan. Moreover, the causes of older people's unemployment and effects of changing economic contexts on this group have been simplified, perhaps over-simplified. Thus, it is fair to say that there are still many knowledge gaps awaiting further investigation, such as what could determine the employment possibilities of older people in Taiwan, what the employment barriers are to employment for this population are and how these are different according to individual circumstances.

With respect to the implementation of employment policies for older people, as Flynn (2010:308) suggests, a “one size fits all” programme cannot reflect the different types of older workers’ demands and considerations. The above shows that current Taiwanese employment policy approaches to older people not only employ the same approach, ‘having a job first’, but also combines older people’s employment services with other disadvantaged groups. Hence, it is argued that the diversity of employment barriers and circumstances among older Taiwanese has been neglected within the PESS. As a result, the effectiveness of older people’s employment services might be considerably limited.

Furthermore, looking at literature and public reports (e.g. BEVT, 2008; Ding, 2009), it seems that the well-cited very low labour participation rates among older Taiwanese might be taken for granted, because no research (as far as literature searches can tell) has investigated how and why this has happened. Exploring the fundamental reasons for low employment rates among older Taiwanese workers may help us to understand why these workers have somehow become marginalised in the Taiwanese context and the difficulties of raising sufficient interest in the issue of older people’s employment.

Another argument here is that the impact of the Taiwanese context on the employment of older people cannot be separated from the concerns of older people’s employment policy. Discussions of the reasons for low labour participation necessarily involve various dimensions; that is, they cannot merely focus on individual perspectives without taking the whole context into consideration.

Indeed, according to my years of working in the Taiwanese PESS as a supervisor for social workers in an out-reach employment programme for all kinds of disadvantaged workers, I

have observed that older job-seekers have fairly complex disadvantages and were less likely to job-seek successfully, compared with other disadvantaged groups. I also sensed that their demands have been potentially underestimated, especially in consideration of national economic competitiveness and the considerable emphasis on family responsibility for older people. However, more concrete knowledge of their employment circumstances, barriers and meanings is needed to support my observations and, more importantly, to provide further suggestions for employment policies towards older workers in Taiwan.

1.3 The research

This research does not build or examine any social theory within a specific theoretical context but is more of an applied social and explanatory study that addresses “why phenomena occur and the forces and influences that drive their occurrence” (Ritchie, 2003:28). It does, however, draw on a number of theoretical models related to older workers’ labour force participation. In short, this research attempts to deconstruct the complex reasons for low labour participation rates among older Taiwanese by focusing on, first, associations between individual characteristics and employment barriers and, second, the impact of socio-economic contexts on those barriers as well as the meanings of older people’s employment. This perspective is particularly justified by the lack of specific past work on older workers and low rates of labour force participation in Taiwan.

Research themes and questions

The primary question is ‘**–What are the circumstances, barriers to and meanings of employment for older people in Taiwan?**’ This question aims to explore the reasons why there are low labour participation rates among older Taiwanese in relation to individual and socio-economic contexts.

This overarching question is divided into three themes and seven sub-questions. The first theme addresses the types of problematic employment circumstances older Taiwanese have encountered. The second looks at identifying employment barriers among different types of older workers. Finally, the third focuses on how socio-economic contexts shape older people’s barriers to employment and constructs meanings of older people’s employment in Taiwan.

Theme 1: Factors and types of employment circumstances among older Taiwanese

- 1) What individual factors have impacted on the employment circumstances of older Taiwanese workers?
- 2) What are the characteristics of older workers who share similar problematic employment circumstances?

Theme 2: Employment barriers among different types of older Taiwanese

- 3) What factors influence the employment barriers among different types of older Taiwanese workers?
- 4) What factors have case managers evidenced as employment barriers?

Theme 3: Employment barriers to older Taiwanese workers and meanings in socio-economic contexts

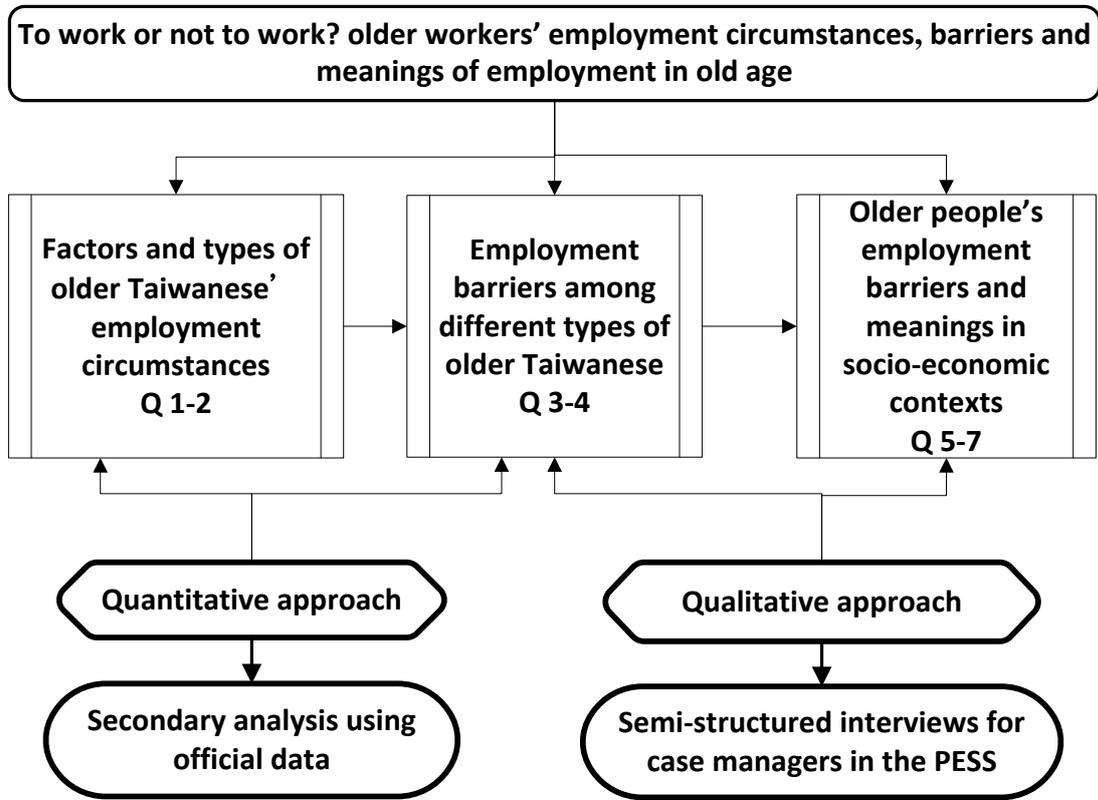
- 5) Which economic and social policy contexts shape the barriers to employment for older people?
- 6) How do social contexts shape barriers to employment for older people?
- 7) How is the meaning of employment in old age constructed in social contexts?

Research methods

Considering the limited budget and time, this investigation is not a comparative social research study but mainly focuses on the Taiwanese context. This research uses mixed methods to answer the above research questions. The framework of research themes, questions and methods is illustrated by Figure 1.1. The first theme, as well as the first part of the second theme, is mainly based on a quantitative approach, along with literature reviews including official Taiwanese reports. The Excel programme and statistics software, SPSS, have been used to re-analyse two sources of secondary quantitative data (large sample surveys) and to group older people into subgroups by the conclusions of the findings.

In the last part of the second and the third theme, semi-structured interviews with case managers in the PESS have been carried out in order to explore the employment barriers and economic and social contexts in relation to older people's individual circumstances in depth.

Figure 1.1 Framework of research questions, themes and research methods



1.4 Outline of this thesis

This thesis is in seven chapters; chapter 2 aims to provide the context of this thesis as well as background to the following chapters. It contains three parts. First, it speaks to a number of theoretical models in relation to older people's employment and three groups of influential factors are developed according to the theoretical models. Moreover, it is noticed that different types of older people share similar employment barriers so that identifying categories of older Taiwanese workers and distinguishing their employment barriers are needed.

The second part seeks to explore the Taiwanese socio-economic context. It is known that family responsibility has been identified as a primary source in terms of social welfare

ideologies and financial security for Taiwanese elders. As a result of the global economy, it is observed that a number of structural changes in the Taiwanese labour market might prevent the Taiwanese from working. In addition, some notions, such as social rewards, family hierarchy and gender patterns, have been identified as crucial elements to the Taiwanese social context. Finally, a picture regarding the low labour participation rates older Taiwanese workers and early exit conditions is outlined, too.

Chapter 3 explains and justifies the research methodologies in this thesis. Based on critical discussions of debates between quantitative and qualitative methods, the reasons for applying mixed methods are presented in detail. Moreover, a reflective account of data collection and analysis, ethical concerns and the limitations of this research are all provided.

The research findings are discussed in chapters 4, 5 and 6. The findings in chapter 4 address sub-questions 1) and 2), in the first theme (factors and types of employment circumstances among older Taiwanese). Chapter 5 seeks to answer the sub-questions 3) and 4) in the second theme (employment barriers among different types of older Taiwanese). Chapter 6 looks at the final theme (employment barriers and meanings for older workers in socio-economic context) and the last three sub-questions, 5), 6) and 7).

The final chapter summarises the research findings and draws lessons from existing literature to illuminate the implications of the findings in this thesis. Moreover, the answer to the overarching research question is addressed by linking the findings in the three chapters with the literature. At the end of this chapter, advice for further research is also given.

2 THEORY, FACTORS AND SOCIO-ECONOMIC CONTEXTS IN TAIWAN

In this chapter, the indicators for older people's employment barriers and motivations will be explored using different perspectives; before doing this, it is important to look at how older workers have been conceptualised. According to Bytheway (2005:362-363), chronological age is usually used by bureaucracies to classify an older population within a political context, which means that age usually becomes a key feature either to include or exclude populations from specific public policies and services. For example, in Singapore, both the ages 55 and 60 were seen as defining older workers, because officially the retirement age was 55, but it was a custom for Singaporeans not to retire until 60 (Jernigan and Jernigan, 1992:27). In Japan, 65 was treated as the start of old age in terms of public provision; but, traditionally, when Japanese reached 60, they are allowed not to work but are supported entirely by their children (Maeda and Ishikawa, 2000:115).

In Taiwan, the age of eligibility for older people's benefits is 70 (Tan, 2001:63). The retirement age for the majority is 65, according to the Employment Service Law, and the legislative definition of older workers refers to those aged 45 to 64 within the public employment service system (CLA, 2008; 2010). One reason for the exclusion of those aged 65 and over from the coverage of older workers, could be ageism; as Tan (2001:59) observed, Taiwanese often have stereotypical views towards those aged over 65, believing "that a person is unable to contribute fully after this age". In fact, the wide and blurred range of definitions of the age of older workers has raised some practical issues, as the *Labour Market Policy in Ageing Society White Paper* (CLA, 2008) admitted. The ambiguous terminology adopted by current regulations has produced some unfavourable side effects.

For example, it excluded those over 65 from public interventions in employment policy and labelled those above 45 as “no longer young” workers, so that, as this paper concluded, it is essential to readjust the confusing definitions of older workers in order to include those above 65 workers into policy coverage (CLA, 2008:2).

Indeed, if taking a life course perspective into account, it is likely that the functions of employment for older people at different ages are rather diverse (eg. Blekesaune et al., 2008; Marshall and Mueller, 2002). Compared with older workers, middle-aged workers usually carried much heavier family responsibilities, for instance, caring both for children and elders, so they might have to work harder to fulfil their family duties (Rudinger, 1976:1; Shore, 1998:110; Fingerman et al., 2004:139; Fingerman et al., 2010:87).

My research aims are to explore Taiwanese conditions, thus those 45 and over will be considered to be the age for older workers here. Those aged 65 and above will also be included in this research, although information about their employment situation might not be as recorded in public reports as it is for those aged 45 to 64.

Despite biological age, broadly speaking, the definition of “being old” is likely to be underpinned by complex socio-economic ideas (Blaikie, 1999:12; Mullan, 2002:20); as academics have reminded us, it would be problematic to categorise populations into groups simply by chronological age without considering social and cultural features and older people’s subjective feeling of age (Fiske, 1979; Hepworth and Featherstone, 1982; Bowling, 2005). According to Rudinger (1976:1), “If you ask people when middle age begins, a young person will say at 30, an older person will say at 55” (also see Hunter and Sundel, 1989). By exploring the effects of subjective age on British older people, it appeared that those who

felt being younger than their chronological age usually had more active social participation, a better quality of life and were physically better (Bowling, 2005:212-213).

By re-analysing the Third Round of the European Social Survey, McKay (2010:165) suggested that, “‘old age’ is seen as a life stage that occurs after the end of economic activity, rather than coinciding with it”; he also found that one-third of British people, both males and females, perceived that old age might start after 70, but results also showed higher that a percentage of females, 20%, felt that older people referred to those who were 60 and over, compared with 11% of males. Therefore, it seems that the identification of ‘older people’ might reflect different personal circumstances and considerations.

THEORETICAL MODELS AND FACTORS

2.1 Human capital, workability and employability

As a result of the changing nature of employment and retirement, a number of writers have argued that human capital (or workability and employability) as playing vital roles in shaping older people’s employment barriers and possibilities (Mincer, 1989; Field, 2000; Green, 2003; Matlby, 2011; Shultz and Olson, 2013). The meaning of capital is regarded as an “investment of resources with respected returns in the marketplace” (Lin, 2001:3). Human capital represents a worker’s ‘value’ which is established by “informal and formal education at home and at school, and through training, experience, and mobility in the labour market” (Mincer, 1989: 27).

Maltby (2011:301) defines employability and working ability as the “ability of people to become employed and be able to sustain that employment or find new employment”.

Similarly, in a well-cited article, Hillage and Pollard adopted a broader viewpoint to define employability as:

“the capability to move self-sufficiently within the labour market to realise potential through sustainable employment. For the individual, employability depends on the knowledge, skills and attitudes they possess, the way they use those assets and present them to employers and the context (eg personal circumstances and labour market environment) within which they seek work” (Hillage and Pollard, 1998: xi).

Lissenburgh and Smeaton (2003) found that having better human capital is beneficial for increasing older people’s flexibility in choosing jobs later rather than directly withdrawing from paid work. Similarly, it is noted that the ending of the reduction of older people’s working ability has been broadly identified as a significant strategy to increase older people’s employment among advanced industrialised countries (Walker, 2002). By re-analysing the US National Household Education Survey (NCES) Simpson et al. (2002) found that employed/job-seeking older workers had a higher likelihood of participating in training or academic educational activities than younger and economically inactive older people. This suggests that consistent investment in an individual’s human capital can be seen as a crucial element for older people’s labour participation.

In the current labour market, which is normally driven by a knowledge-base economy, Grip (2006:124) identifies two major types of deficiency in human capital: firstly, “technical human capital obsolescence” (which is caused by biological ageing and declining physical strength), and, secondly, “economic human capital obsolescence” (which revealed changing techniques of productivity and reducing demands of labour forces). As Mayhew and Rijkers

(2006) have observed, as a consequence of the transformation of productive techniques in modern labour markets, older people's working ability is devalued, so their working opportunities are usually limited by skills issues and a lack of available jobs.

Similarly, Bartel and Sicherman (1993) have found that rapidly changing requirements in working skills and expertise could discourage older people to remain in work, unless they were given opportunities to improve their human capital. Thus, it is noted that older people's productivity is usually misjudged by having relatively lower educational qualifications, higher accumulated and expected incomes, less geographical mobility, declining physical ability and, most significantly, limited knowledge of modern working skills, and extremely restricted working opportunities (Mayhew and Rijkers, 2006).

Since the importance of older people's employability and human capital has been fully identified here, the next question that should be asked is, 'what factors might decide an older person's employability'? Relevant models have been selected to frame this question.

Based on the results of longitudinal research, the Finnish Institute of Occupational Health and a famous Finnish academic, Juhani Ilmarinen (2001:632), established 'The Work Ability Index' (WAI) as a tool to evaluate employees' work ability. Seven major items were used as important indicators of work ability in this index:

- 1. Current work ability compared with the lifetime best*
- 2. Work ability in relation to the demands of the job*
- 3. Number of current illnesses diagnosed by a physician*
- 4. Estimated work impairment due to illness*

5. Sick leave during the past year (12 months)

6. Own prognosis of work ability 2 years from now

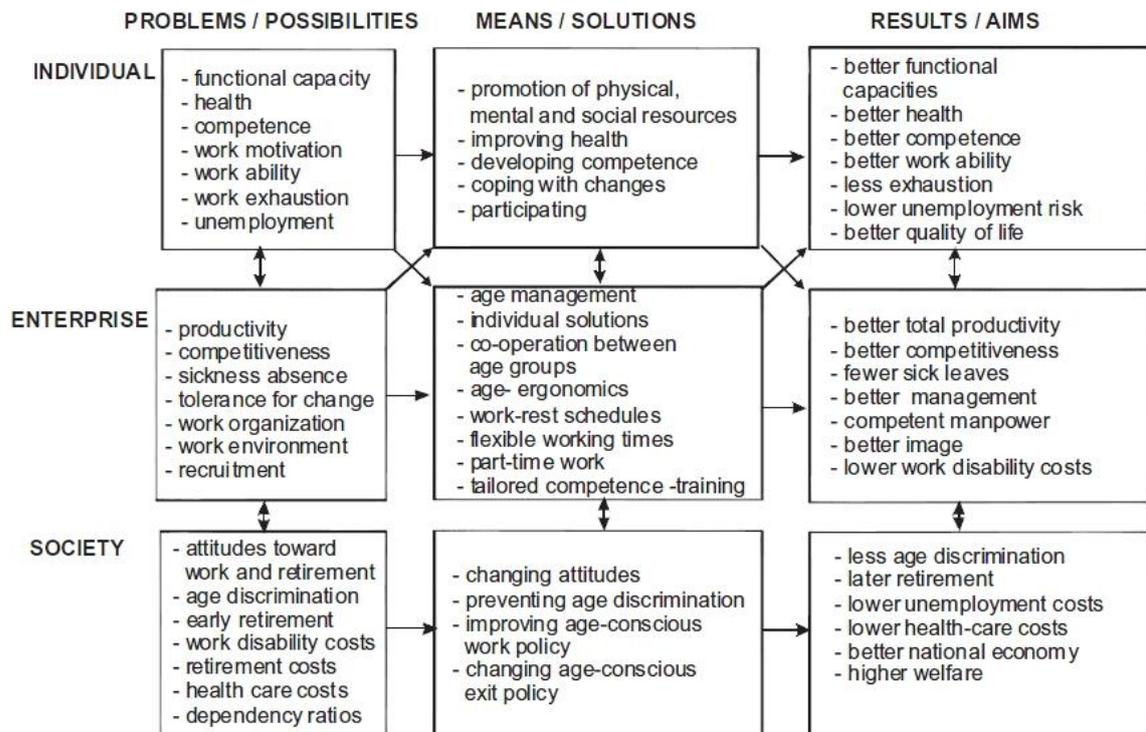
7. Mental resources

Ilmarinen (2007:160).

Moreover, Maltby (2011:302) pointed out that the WAI could be used to “balance personal factors, such as physical and mental health, skills and motivation, with the job itself, how it is managed, what the working environment is like and what the role actually entails”. In practice, according to Ilmarinen (2001:663), results of empirical studies showed that Finnish employees’ WAI percentages appeared to decrease considerably from the age of 51 to 62 in both genders and mental/physical conditions. In this case, it seems that declining work ability (by the above WAI) is an important obstacle for older people to remain in or access employment.

In addition, Ilmarinen (2001:634) and his research team proposed a “work-orientation matrix” to illustrate how to improve older people’s working ability and employability (Figure 2.1). In this matrix, older people’s employment barriers have been listed in detail and are grouped into three broad dimensions: individual, enterprise and society (which are followed by different solutions and intervention aims). This implies that issues concerning older people’s employment might not only be regarded as individual problems, but also are interrelated by employers’ considerations, such as: human resource costs; organisational cultures and economic productivity; relevant labour market policies; social attitudes; and social security systems.

Figure 2.1 Ageing and the Work-orientation Matrix



(Ilmarinen, 2001:634)

Research conducted by Taiwanese academics using this matrix to evaluate working ability among older Taiwanese suggest that older Taiwanese might be more suitable in the service sector in terms of individual physical capacity and increasing flexibility of working time; moreover, it is highlighted that increasing employer motivation to recruit older Taiwanese workers by public intervention is crucial (Huang and Shan, 2007). However, how interactions among individual, enterprises and society characteristics determine older workers labour participation in Taiwan remains in unknown and further research is needed.

Likewise, Hillage's and Pollard's descriptions of the determinants of employability also employ holistic points of view, including four components, "assets, deployment,

presentations and context” (1998: xi-xiii). McQuaid and Lindsay (2005:209-10) expand the above concepts into a comprehensive model with three practical categories:

1. Individual factors: employability skills and attributes, demographic characteristics, health and well-being, job-seeking, adaptability and mobility

2. Personal circumstances: household circumstances, work culture and access to resources

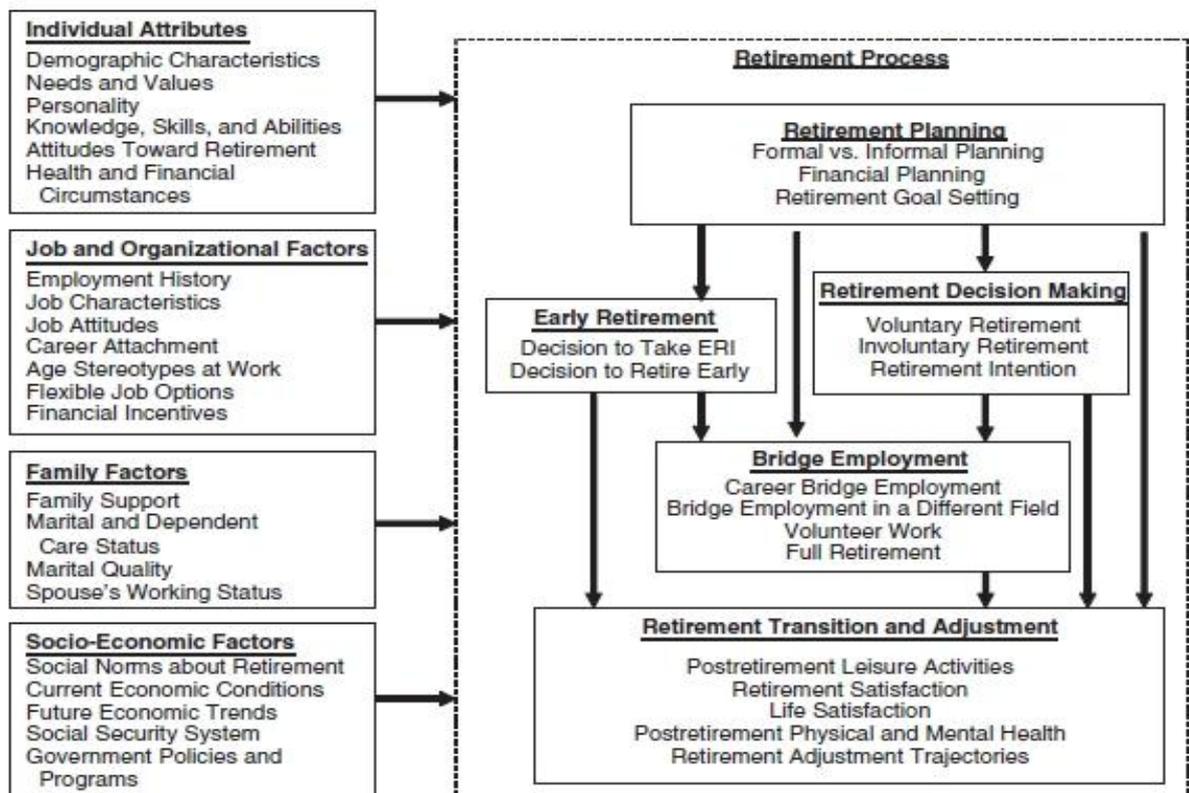
3. External factors: demand factors, labour market factors, and enabling support factors: employment policy factors (McQuaid and Lindsay, 2005:209-10)

Based on McQuaid and Lindsay’s model, the factors of ‘context’ (in Hillage’s and Pollard’s work) focused particularly on labour market conditions and policy interventions. Indeed, the literature also suggests that employment policies along with contemporary welfare ideology appear to be crucial influences on older people’s later employment (this will be discussed later). Moreover, pension systems and social security regimes more or less produced negative effects on older people’s working motivations (Mayhew and Rijkers, 2006; Grip, 2006).

Comparing the above models, Ilmarinen’s ‘ageing and work-orientation matrix’ puts more emphasis on social norms and attitudes. By contrast, McQuaid and Lindsay pay additional attention to the influence of employees’ households. However, as Gamarnikow (2003:1290) states, “human capital development is socially embedded in, and contributes to the reproduction of, social stratification”; thus, it is likely that socio-economic factors which contribute towards determining older people’s human capitals can be seen as one of the central concerns.

After reviewing a range of empirical evidence, Wang and Shultz (2010:182) likewise conclude that “individual attributes”, “job organizational factors”, “family factors” and “socio-economic factors” might be equally crucial in terms of older people’s retirement decision making. As Figure 2.2 illustrates, whether or not to work not only depends on the above mentioned individual and contextual factors, but also correlates with older people’s marital status, sources of family support, as well as family financial/care giving responsibilities being highlighted as determining family factors (Wang and Shultz, 2010:182).

Figure 2.2 Summary of Issues and Relationships Considered in Empirical Studies on the Retirement Process



Wang and Shultz (2010:182)

The family's capacity has specific impacts upon shaping an individual's human capital. For instance, it is rare that married older females would remain in work on their own (Weaver, 1994; also see Vickerstaff et al., 2008) and older individual economic status appears to be significantly correlated with a spouse's, with a tendency that they want to retire together (Blekesaune et al., 2008). As Becker (1993) states, children in poorer families might have less possibility to invest in their human capital and, consequently, the whole family, including the older generation, may stay in low paid jobs.

As has been mentioned, family factors are likely to have a crucial impact upon an older individual's later employment; however, in some respects, it is argued that family functions and ties are seen as vital elements in building up an individual's social capital (see Coleman, 1988; Putnam et al., 1993; Gamarnikow, 2003). Social capital will be further discussed below. By assuming that an older worker's employment probability might be driven by their human capital or working ability, the perspectives of Western governments' towards older people's later life has shifted from a passive to an active view. From the 1960s onwards, early retirement has been replaced by "successful ageing", "productive ageing" and recently, "active ageing" (Walker, 2002:121-124). Also, keeping "economic usefulness" (Estes et al., 2003:70) by engaging in the labour market has been highly valued by Western policy makers. In practice, activation of older people's human capital became a primary objective of employment policies in the west. According to Taylor-Gooby (2008:11), the social investment approach was put forward as a means of promoting nationwide economic competitiveness and increasing the economically inactive population's employment probability, particularly for older people with low educational levels and training standards.

A series of policy reforms aimed at older workers were introduced. Firstly, Active Labour Market Policies (ALMPs) were adopted as an overall guideline towards improving the usage and productivity of human capital, particularly for younger and older people (Kluve and Essen, 2006; Carcillo and Grubb, 2006). Secondly, the age of mandatory retirement was gradually increased or abandoned; more and more interventions were put upon increasing older people's employability and motivation (Taylor, 2004; Ilmarinen, 2002). For example, the mandatory age has been abolished in the U.S. and parts of Canada (Marshall and Taylor, 2005:579; Walker, 2002:129); consequently, there is not a cut off age which forces workers to withdraw from the labour market in these areas.

In practice, the idea of mandatory age is often replaced with a retirement age or pensionable age, which means that older workers can either access their pensions or work for longer. Many nations have increased their retirement ages, such as in Japan, where it increased from 60 to 65 (Tillsley and Taylor, 2001:316), to 70 and over in Sweden and to 68 and over in Italy (Walker, 2002:129). The trend of increasing pensionable ages may continue for decades. As Turner (2007:86) has shown, the median pensionable age for men and women in OECD countries will rise from 62 and 60 respectively in 1993, to 65 for both sexes in 2035; the mean pensionable age will increase from 62.2 and 60 in 1993 to 63.4 and 63.3 in 2035.

In Asia, however, pensionable ages in most countries still remain low compared with OECD countries; mainly between 55 and 60 (Beattie, 1998:83). It was 55 in Singapore and Indonesia; 60 in the Philippines and South Korea; 60 for civil servants in Thailand; 65 for civil

servants and 60 for other employees in Taiwan (Raymo and Corman, 1999:225, Yoon and Hendricks, 2006:14).

2.2 Social capital and ageing culture

The notion of 'social capital' originally refers to a wider, structural perspective; as Putnam et al. (1993) state, social capital is constructed by "social organisations, such as: trust, norms and networks" (Putnam et al, 1993:167) so that "it is ordinarily a public good, unlike conventional capital, which is ordinarily a private good" (Putnam et al, 1993:170). In a well-cited article, Coleman (1998) describes an individual's social capital as being shaped by three features:

"obligations and expectations, which depend on trustworthiness of the social environment, information-flow capability of the social structure, and norms accompanied by sanctions"
(Coleman, 1988:5119).

It is assumed that social norms and values play a role in steering people's decision making. As Lin (2001: xi) points out, "social capital is ingrained by social relations and facilitated or constrained by them". Considering how social capital affects an individual's life, social norms will affect an individual's human capital individual living circumstances (Coleman, 1998).

In terms of the impact of social capital on individual employment conditions, social capital is proposed as a significant feature influencing a worker's health and productivity (Kawachi et al., 1997; Liukkonen et al., 2004; Putnam et al., 1993). An empirical study conducted on two British farms found that employees' productivity was normally superior if they had better

social relationships with their managers, so it is suggested that their personal social networks in the work place will determine their overall performance (Bandiera et al., 2008). Statistical research in the United States found that reducing investment in social capital might result in the appearance of income inequality and increase worker's mortality (Kawachi et al., 1997).

In addition, Liukkonen et al. (2004) found that governmental job subsidies had provided the unemployed in Finland with a crucial path in connecting to society, because withdrawing from the labour market otherwise prevented individuals from accumulating social capital. Similar observations have been made in Taiwan. This shows that providing social support and establishing community networks can help older Taiwanese cope with the risks of an ageing society (Yeh, 2005). Abrams et al. (2011) researched the construction of age discrimination in Europe and found that the lessening of social interaction with younger generations is probably harmful for older people's social capital and benefits, and would increase the prevalence of ageism. From the above, it seems that social networks, contacts and attitudes have a significant impact on a worker's employment.

Given that social attitudes influence an older person's employment, some academics have proposed the idea of an ageing culture to describe this scenario; Vroom (2004:8) define an ageing culture as "the shorthand description of social norms, values, ideals or perceptions in society that structure the ideas of the age-work relationship"; therefore, older people's employment attitudes might vary by different collective preferences. For example, older Norwegians appear to have high employment rates because they commonly believe that remaining in work is an older person's social right; by contrast, "early retirement" was seen

an unchallengeable social right in France, with older French people usually being unenthusiastic about staying in work (Vroom, 2004).

Similarly, Hult and Edlund (2008:109) compared “non-financial commitment to employment” in two types of ageing cultures (late exit culture in Norway and Sweden versus an early exit culture in Germany and Denmark); they found that declining willingness to work among older workers from early exit culture countries indeed started at much earlier ages; and this study also showed that older males might prefer to withdraw from paid work much earlier than females; data showed that a low willingness to work for men started in the age group 43-54, compared with women, who started at 55 and upwards.

Furthermore, it seems that the ageing culture in relation to older people’s employment is shaped by various social, economic and cultural influences. As Gilleard and Higgs (2000:29) point out, discussions on the nature of ageing normally has two facets; first, personal identity, which is regarded as the way in which individuals reveal themselves individually; and, secondly, social identity, which often focuses on how “economic and cultural institutions” shape a population’s social position within a collective framework. For instance, from the 1980s, due to the stress of an ageing labour market, early exit was abandoned in many western countries; instead, “productive ageing” (Walker, 2002:123) was proposed and personal “economic usefulness” emphasised (Estes et al., 2003:70).

Practically speaking, the establishment of older people’s public policies and services were often driven by the discourse on ageing; Blaikie (1999:62-3) argued that authorities control the public discourse to achieve their political purposes, such as by undervaluing older

people's employment in order to discourage their labour participation. Estes et al. (2003:67) gave a clear example to describe how this had happened in Western countries:

“while ‘positive ageing policies’ are becoming increasingly popular in North America (Estes et al., 2001) and parts of Europe (Walker and Naegele, 1999) and are largely replacing assumptions that old age is a time of dependency and decline. This guiding narrative has an effect on both the public legitimacy and the personal identities made available to older people, with a particular emphasis on the value of work and work-like activities”.

It seems that the labour market structure and economic conditions also play a role in shaping the ageing culture. For example, higher unemployment rates will compress labour participation rates for older people (Leppel and Clain, 1995:901). Clark et al. (1999:411, 429-431) have found that the more young workers a country has, the less working opportunities there are for older workers, and the more low-technically skilled jobs a country has, the greater the possibility that older people will stay or re-enter in labour market.

Above all, it suggests that social capital and ageing cultures have significant impacts upon social attitudes towards older people's employment and working opportunities. Given that the definitions of Taiwanese ageing culture as well as social capital are too complex to be identified by a single piece of research, by contrast, discovering Taiwanese social attitudes toward older people's employment can equally be seen as a crucial step. In particular, it is important to understand the kinds of social attitude this society has and how this associates with the crucial elements of an ageing culture and social capital, such as: social values, social policy and economic changes.

2.3 Influential factors on the employment and retirement of older people

This research aims to explore the causes of low labour participation rates among older Taiwanese. One research theme is to identify the influential factors and types of older people's employment circumstances. With respect to influential factors in relation to these models, a number of similarities have been found. First, **individual factors**, including demographic factors, personal circumstances and family conditions are important (for individual factors, see Ilmarinen, 2001:634; individual factors and personal circumstances, see McQuaid and Lindsay, 2005:209-10; individual attributes and family factors, see Wang and Shultz, 2010:182). Second, an employer's political and economic relevant factors (enterprises and society factors, see Ilmarinen, 2001:634; external factors, see McQuaid and Lindsay, 2005:209-10; job organizational and socio-economic factors, see Wang and Shultz, 2010:182), and finally, social-cultural factors (societal factors, see Ilmarinen, 2001:634; socio-economic factors, see Wang and Shultz, 2010:182; ageing culture, see Vroom, 2004; social identity, see Gilleard and Higgs, 2000).

Vickerstaff et al. (2008) divided older people's employment barriers into three categories: personal, structural and cultural factors. They detailed the content of structural factors as "pension, tax and benefits regimes, interactions with government agencies..... patterns of demand for labour and employer behaviour" (Vickerstaff et al., 2008:3); but, regarding cultural factors, they proposed that the attitudes of family and friends as cultural factors and highlighted the impacts of cultural factors, such as the social meaning of retirement, which are likely to be "widely held in society, even if not attainable by everyone". With respect to factors in detail, a wealth of surveys have produced knowledge in terms of the determinants of older people's employment (e.g. Vickerstaff, S, et al., 2008; Irving, P., et al., 2005;

Phillipson, C. and Smith, A., 2005; Smeaton, D. and McKay, S., 2003; Humphrey and et al., 2003); further descriptions are summarised below.

Individual factors

In general, health related issues and financial circumstances were both considered to be important factors for the employment of the older population. Generally speaking, declining physical strength is recognised as a limiting factor for later employment, and having insecure financial conditions might increase the possibility of remaining in work (Hansson et al., 1997; Lissenburgh and Smeaton, 2003; Phillipson and Smith, 2005; Irving et al., 2005; Silverstein, 2008; Vickerstaff et al., 2008; Maltby, 2011). Other researchers have also found that the better the financial condition an older worker has, the greater possibility they would choose to retire early (McNair, 2006; Flynn, 2010).

Moreover, Lissenburgh and Smeaton (2003:2-3) have observed that a number of factors will decrease the employment rates of older people, including “qualifications and earnings” (especially for older men), “the industry and occupation in which they are employed”, “partnership status” and “age discrimination”. Based on a minibus survey, McNair (2006:490) recognised four features, “qualification, income level, occupational level and gender,” as crucial indicators for the employment of older British workers. Furthermore, Smeaton and McKay (2003) suggested that gender, marital status, pensions and types of jobs have a significant impact in determining the possibility of early exit among older workers. Similar observations have been made in the United States and, moreover, it is indicated that individual factors, such as health conditions, gender and skills, are related to socio-economic

contextual factors, such as the global economy, ageism and social status (Hansson et al., 1997).

Despite demographic factors, changing skill requirements and older worker's subjective perceptions of their working life are also influential. Campbell (1999) indicated that, as a result of changing production technologies in modern economies, low-skilled and low-paid older workers are more often excluded from the labour market. Likewise, Hansson et al. (1997) found that older American workers having special skills are important human resources for companies in coping with global competition. Simultaneously, improving educational and skill levels for older workers are now also crucial. Phillipson and Smith (2005) found that older individual's work-related issues and plans for later life may reduce their working motivation, whereas consistently updating occupational skills may have a positive impact on increasing the possibility of working for longer.

As for older people's personal considerations, it is shown that many older British who decided to retire perceived that "they had worked for long enough" (Vickerstaff et al., 2008:2). Moreover, older worker's subjective perceptions may be related with other non-individual factors. Weaver (1994:5) suggested that "income not related to current work effort" could be seen as a pushing driver among older workers. Nine relevant factors have been identified by several academic institutes as determining factors, including "flexibility, social relationships at work, enjoying work, caring/providing responsibilities, respect/self esteem, loyalty to an organisation, sense of contributing to society or a cause, financial security (now or in retirement), and self sufficiency" (McNair, 2006:486 cited in Branes et al., 2004; American Association for Retired Persons, 2002 and Employers Forum on Age, 2005).

Employers, policy and relevant economic factors

Apart from the individual's characteristics, external characteristics could also limit or facilitate the possibility of older people's employment, in relation to human capital and employability. As McQuaid and Lindsay (2005:209-10) point out, both labour market policies and employment policy interventions may have a crucial impact on workability. These external factors are referred to by other academics as institutional or organisational characteristics (see Vickerstaff et al., 2006; Phillipson and Smith, 2005; and Loretto and White, 2006b).

In terms of relevant employer factors, Vickerstaff (2006:515) asserted that "employer behaviour" might be the dominant driver in deciding older individuals' further employment rather than individual working motivations. By reviewing the changing nature of the ageing labour force in the U.S., Silverstein (2008:269) found that "work environment, work arrangements and work-life balance, health promotion and disease prevention, and social support" are crucial elements in moderating older people's employment difficulties and increasing their labour participation rates.

With respect to the importance of political considerations and economic conditions, welfare system designs, especially pension systems, have an important impact (Walker and Maltby, 2012). In many advanced ageing countries, active policies have emerged as a political solution to substitute past passive policies (Lodemel and Trikey, 2001:1-2). As a result of appreciation of an active labour force, older European people's contributions have been misjudged by concerns about pension and social care costs and the consequences of an ageing labour force (Maltby and Deuchars, 2005:21).

However, it seems that employer attitudes towards this age group's employment vary by region and according to economic conditions. According to Harper et al. (2006:36), 40% of employers in less developed economies believe that "older people leaving makes rooms for younger people"; whereas 49% of those in advanced economies think that "older workers leaving means the loss of valuable knowledge and skills that are important to the organisations". Reflecting on the East Asian context, employers in Japan, Hong Kong, Singapore and China claimed that "they *do not need* to attract older workers...it is not an urgent issue"; therefore, just 19.5% of employers in above Asian countries would "try to recruit older workers" whereas 44% and of employers in the U.K. and 35% in the United States and Canada would do so (Harper et al., 2006:36-41).

It is also noticed furthermore that ageism is a widespread issue in preventing older people from remaining economically active (Walker and Maltby, 2012). Older people are often attached to stereotypical and unhelpful images, such as helplessness; confusion; being reluctant to change; dependence; conservative thinking; lacking innovation; old-fashioned; lower energy; and so forth (Bytheway, in press, cited by Bytheway, 2005:362; Hunt, 2005:39; Mullan, 2002:4); or concerns about increasing public expenditure, social burdens and unaffordable benefit claimants (Mullan,2002:2; Phillipson, 1998:3; Estes et al., 2003:70-71; Reday-Mulvey, 2005:4).

Additionally, Platman (2004) argues that flexibility of working environment has been beneficial for older workers in extending their working lives. However, it required public policy interventions and willing employers; as Loretto and White argue, employer and public policies significantly oppress older worker's opportunities for later employment:

“...our respondents [aged 50+] were positively oriented to work...However, they felt that organisational policies, in the form of rigid retirement dates, inflexible pension rules, or employment practices, such as redundancy equalling early retirement, or lack of training and promotion opportunities, would force them to leave employment at- or even before- their normal retirement age” (Loretto and White, 2006b:503).

As for economic factors, it has been observed that high unemployment rates and having greater numbers of younger labourers may decrease the possibility of older people retaining work (Leppel and Clain, 1995; Clark and et al., 1999). In practice, much research has highlighted particular industries, requiring occupational skills; company size; job type; and, most importantly, age stereotypes, are likely to be associated with barriers to the employment of older people (Harper et al., 2006; Taylor and Walker, 1994; Chiu et al., 2001; and Loretto and White, 2006a). In reality, employment barriers in relation to economic issues seem to be harder to overcome with policy interventions. For instance, although the effectiveness of ALMPs has been demonstrated, in terms of reducing unemployment rates statistically (OECD, 2005), ALMPs are unlikely to “alter the economic prospects of the individuals” (Kluve and Schmidt, 2002:413).

Socio-cultural factors

Cultural characteristics refer to the overwhelming social phenomena which can potentially drive the decisions of individuals, policy makers and employers concerning the employment prospects of older workers. Vickerstaff et al. (2008:4) identify three cultural considerations of retirement: first, retirement as a period of freedom; second, negative attitudes towards retirement; and, finally, the influences of family, friends and work colleagues (Vickerstaff et

al, 2008:78-81). Retirement might also result in self-isolation from the mainstream, as Walker and Maltby (2012:S118) have argued, as older retirees “were simultaneously detached from paid work together with the main sources of political consciousness and channels of representation”.

The above factors are more likely to apply to a Western context and might not be expected to therefore correspond entirely with Taiwanese experience. With reference to one of the main themes of the research questions, older people’s employment barriers and meanings within the socio-economic context, it is crucial to understand how the socio-economic context conceptualises the meaning of older people’s employment within a Taiwanese context.

2.4 Types of older workers’ employment circumstances

The above discussion seems to suggest that factors which influence older people’s employment conditions are complex; consequently, issues relating to the maintenance of employment are diverse. As Hansson et al. (1997) point out, some older workers might struggle to prevent their productivity from declining, but some might be concerned about the preservation of decent income levels and social status. In fact, the ability to decide whether or not to work is crucial, with Phillipson and Smith (2005:3) pointing out that: “decision-making in the work/retirement transition will be influenced by the degree of control which individuals have over key events affecting their lives”.

In terms of the degree of control of employment circumstances among different older workers, McNair proposed three distinctive types:

‘Choosers’ have high qualification and incomes and are in professional and managerial jobs. They have greatest sense of control over their working lives and the most positive experience of work.

‘Survivors’ have low or no qualifications, and are in routine and semi-routine jobs, they have the least control over their working lives, and are most likely to leave work early through sickness or redundancy.

‘Jugglers’... They are overwhelmingly female, mostly with formal qualifications below degree level, and in intermediate occupations. Their job choices are partly conditioned by domestic and caring responsibilities. (McNair, 2006:490)

McNair’s work seems to suggest that, first, individual factors shape older people’s employment circumstances as well as their employment stability; second, the degree of control over their employment decision making might be associated not only with individual factors, but also with their family duties, particularly for women.

Flynn (2010) compared results of six studies and grouped older workers into eight types, first by ‘haves or have not’, and then by four conditions: financial security, domestic responsibility, social networks and flexibility of job-changing.

	Haves	Have-nots
Finance	Roosters, exit strategists, happy to retire, choosers	Workers, work till they drop, workhorses, survivors, stressed
Care responsibilities	Professional and creatives, down-shifters, jugglers, enthusiasts	Reluctant quitters, blown off course, detached
Social networks	Sheepdogs, connectors, don’t want to retire, identity maintainers, entrepreneurs	Forced to retire
Career flexibility	Cats, career changers	Rejected workers

(Flynn, 2010:319)

This shows that different types of older workers might encounter various problematic employment circumstances. For example, according to the above figure, older workers who do not have financial security, social networks and employment flexibility consistently had a lesser degree of control over employment circumstances, and, consequently, are more likely to be excluded from the labour market. However, Flynn (2010) also indicates that the effects of having caring responsibility is controversial; on the one hand, it might limit older workers' flexibility; on the other, it might increase their willingness to work, due to rising financial stresses.

This implies that some older workers might suffer similar difficulties in work; for instance, it is likely that the low skilled or low educated may not have stable employment conditions; moreover, those who had caring responsibilities or limited social networks are more likely to fall into unemployment involuntarily. It is believed that having a good understanding of specific employment problems/barriers is important for employment policy making; however, looking at the existing literature, little attention has been paid to identifying distinguishing types of older Taiwanese's workers, as well as exploring their specific employment problems. Thus, it is likely that further research aimed at identifying older Taiwanese's employment problems and typologies is needed. One of the research questions in this thesis, therefore, will attempt to group older Taiwanese workers by similar employment circumstances.

THE TAIWANESE SOCIO-ECONOMIC CONTEXT

It has been shown in the above that contextual factors, social values, family responsibility and socio-economic conditions appear to have a significant impact on an older worker's

human capital, work ability, employability and employment circumstances. In the following, further discussion of the socio, economic and cultural contexts in Taiwan will be introduced as a way of providing fundamental background to this research.

2.5 The social welfare context and older people's well-being

Although the work of Esping-Andersen has faced a number of criticisms (see Allen, et al., 2004, Aspalter, 2001a; Aspalter, 2002a), his work nevertheless reminds us that there might exist a systematic connection between capitalist welfare ideology and practical welfare provision (Jones, 1993). In general, welfare states in the advanced industrial countries are classified by Esping-Andersen into three types: social democratic, liberal and conservative (Esping-Andersen, 1990, 1996). The Nordic countries were identified as social democratic countries and European continental countries as liberal, while countries such as Switzerland, the U.K. and U.S are defined as conservative welfare states (Esping-Andersen, 1990, 1996; Allen et al., 2004:75).

In Taiwan and three East Asian New Industrial Countries (NICs), South Korea, Singapore and Hong Kong (Goodman and White, 1998), family responsibilities are traditionally seen as the main sources for the maintenance of individual well-being (Doling and Ronald, 2012; Sykes, 2009). According to Doling et al.,

“the family had an obligation to provide, as best they could, whatever income support, health, education or social care provision most people in the world were even likely to receive, wherever they were brought up” (Doling et al., 2005:192).

Thus, the government's duty to secure older people's later life had largely been replaced by the family and which thus has become the second tier (Tu, 1996; Walker and Wong, 2005; Goldman et al., 2006; Fan, 2007; Son et al., 2008; DSMIA, 1997 cited by Ku and Chen, 2001:107). Drawing upon the literature, a number of typologies of the East Asian welfare ideology has been proposed by academics. The first is one where limited welfare coverage and encouraged national economic growth is emphasised; some define this as a conservative capitalism regime (Kwon, 2005:5; Chen, 2005:97; Esping-Andersen, 1990:40, Goodman and White, 1998:14) or a "productivist welfare capitalism" (Holliday, 2005:708-709). The second type, as a result of highlighting of family responsibility and strong attempts at avoiding welfare dependency, is termed "reluctant welfarism" (Midgley, 1986 cite by Ku, 2000:40). They have also been called "familistic" societies (Goodman and White, 1998:9) or, if referring to common cultural roots, a third type, is "Confucian familialism" (Esping-Andersen, 1996:24), "Confucian welfare ideology" (Sykes, 2009:482) or, "Chinese-aculturated" societies (Jones, 1993:202).

Emphasis on family responsibility, strongly valuing self-discipline and self-assistant virtue, also contributes to these descriptions (Aspalter, 2002b:185; Wilding, 2005:181). As Goodman and White (1998:17) observed, these East Asian societies "discourage dependence on the state and make full use if available social resources" and are seen as "a vital key to social stability and good order" (Doling and Finer, 2001:299). In practice, occupational insurance which requires more or less personal contributions from working incomes are usually built up as the first welfare schemes in this area (Baba, 1978 cited by Goodman and Peng, 1996; White and Goodman, 1998).

In Taiwan, as with other East Asian NICs, the welfare regime originated from a combination of Confucianism and Bismarckian ideas (Goodman and Peng, 1996:195); the latter were introduced to Taiwan after the Second World War by the Republic of China, which had been founded by Dr Sun Yat-Sen in 1910 on the Chinese mainland (Hill and Hwang, 2005:149). In the early stages, “limited coverage” and “specifically biased coverage” could be used to describe the extent of Taiwanese welfare provision; there were only a few occupational groups covered by social insurance, such as civil servants, teachers and military servicemen (Chen, 2005:100; Chen, 2005:177-178), and almost all these social schemes were established on a contributory base (Chen, 2005:177).

As a result of economic growth and political campaigning between the two main parties, the Chinese Nationalist Party (Kuomintang, or KMT) and the Democratic Progressive Party (DPP), several universal welfare systems have been implemented in recent years (Goodman and White, 1998:14; Ku, 2001:120; Chen, 2005:97-99; Hill and Hwang, 2005:151-152; Kwon, 1998:46). Compared with the limited welfare provision in the past, Taiwanese society is now been described as a “developmental-universalist state” (Holliday, 2000:713-714) along with increasing awareness of individual social rights (Chen, 2005:185-186). However, because economic policy usually plays a leading role, the development of social welfare systems has often been interrupted by political concerns or global financial crises. For example, when a high unemployment rate was recorded alongside the reconstruction of the labour market, President Chen declared to tackle the economic downturn in 2000 and that the “construction of social welfare needs to be postponed because economic development is the priority now” (China Times, 10th September, 2000).

In contrast to the Western context, 'welfare' is more likely to be defined as "well-being" and also "certain kinds of collective provision which attempt to protect people's welfare" (Spicker, 1995:5), and entitlement to welfare normally rooted in social rights and responsibilities in the Western context (Esping-Andersen, 1990:3; Holliday, 2000:708). The government's role in Taiwan and other East Asian areas is often minimised; instead, the family usually assumes a major role in securing an older individual's well-being (Tu, 1996; Doling et al., 2005; Zhan et al., 2008).

Indeed, older Taiwanese are less likely to be seen as a social burden in terms of concern for public expenditure. For instance, in Taiwan, the coverage of family responsibility covers almost all kinds of kinship. According to *Civil Code Articles 1114 and 1115*:

Article 1114

The following relatives are under a mutual obligation to maintain one another:

(1) Lineal relatives by blood;

(2) One of the husband and the wife and the parents of the other party living in the same household;

(3) Brothers and sisters;

(4) The head and the members of a house

Article 1115

In case there are several persons bound to furnish maintenance, the order in which they are to perform such obligation is as follows:

(1) Younger lineal relatives by blood;

(2) Elder lineal relatives by blood;

(3) Head of the household;

(4) Brothers and sisters;

(5) Members of the household;

(6) Daughter-in-law and son-in-law;

(7) Parents of either the husband or the wife.

Among the elder lineal relatives by blood or younger lineal relatives by blood, the person nearest in degree of relationship will be the first

(Ministry of Justice, 2010).

Fu's research also showed that universal social benefits for the elderly in Taiwan appeared to have very limited effects upon "de-familisation of older people's financial resources" and it was found that the introduction of universal social allowances did not effectively share children's responsibility toward financially supporting their elders (Fu, 2005:3-4). The Department of Social Affairs in 1994 declared future guidelines of elderly care as:

"linking community resources to strengthen family functioning and social responsibility, to build up a supportive community system" (Ministry of the Interior, 1994 cited by Hwang, 2001:252).

As a Ministry of Interior report showed, the majority of older Taiwanese are expected to live with children and indeed they do live in multigenerational households. According to an annual governmental survey in 2009 (Ministry of Interior, 2011), 69% of those aged 65 and

over declared that living with their children was the ideal living style and only 15.6% expected to live with their partners; regarding the co-resident condition, data showed that 68% of Taiwanese 65 and older were living with children, especially male children. Moreover, the multiple-generational co-residency rate has increased considerably, by 8% from 2005 to 2009 (ibid); this increase seems to suggest that a preference for living with children was still popular.

2.6 Economic context and structural changes to the labour market

Historically speaking, Taiwan was isolated before 1500 with only a few aboriginal tribes living there. Following a number of political events and wars, the island was occupied by China and Japan respectively and was then governed by newly arrived Chinese immigrants led by Chiang Kai-Shek and his party, the KMT, from 1949. Following Japan, Taiwan and three other NICs experienced rapid economic growth from the early 1980s (Goodman and White, 1998:3-6). In terms of common economic success, these East Asian NICs were called “Little tigers” or “Little Dragons”; also, it is suggested that they shared a similar Chinese-rooted, Confucian, culture (Jones, 1993; Bary, 1998:4; Kwon, 2005; Lee, 2005).

The labour markets in many advanced Western countries experienced significant structural changes after the 1960s along with the global economy, which challenged political assumptions of full employment and ‘males as bread-winners’. As a result of changing models of production, from Fordism to post-Fordism, the number of service jobs significantly increased, thereby replacing the rapidly declining number of manufacturing jobs (Alcock, 2003; Ellison, 2009). In Taiwan, this trend occurred from the 1990s onwards. The original labour intensive economy has been replaced by a “service-dominated and knowledge-based”

(Chan, 2004:257) or a “capital- and skills-intensive” (Chen, 2005a:171) economy; therefore, high-skilled working opportunities in or service sector employment has dramatically increased as the manufacturing sector has declined.

In the past, constrained by limited natural resources, cheaper manpower was the main economic resource in Taiwan. Thus, along with some other East Asian economies, the economy has been affected by globalisation and has become vulnerable (Jones, 1993:199-201; Kwon, 2005:8). For instance, in 1997, the Asian Economic Crisis severely damaged the nation’s economy and those of East Asia more generally. The economic growth rates in Korea, Singapore and Hong Kong were -6.7%, -0.1% and -5.3% respectively (Kwon, 2005:10). Thus, maintaining economic competitiveness has been the main goal of state-led policies for these countries (Deyo, 1992:289-290; Hill and Hwang, 2005:150; see also Wolf, 1970; Ku, 2001; Ku and Chen, 2001; Knodel et al., 2002; Wong, 2005; Chen, 2005a; Ko et al., 2007; Goodman and White, 1998:14; Hill and Hwang, 2005).

In explaining the economic growth in Taiwan since the 1970s, it has been noted that Taiwan gained its economic success by taking advantage of low labour force costs underpinned by a labour-intensive and export-oriented economy. However, by the end of the 1990s, due to rising labour costs and the increasing openness of the Chinese labour market, most local Taiwanese enterprises had either closed or moved to mainland China. Since then, the golden age of extremely low unemployment rates has been replaced by persistently high unemployment rates as a result of dramatic structural changes in the Taiwanese labour market (DGBAS, 2011). When the opposition DPP won its first Taiwanese presidential election in 2000, a year with the first peak of high unemployment rates, it introduced unemployment benefits and integrated unemployment benefits with occupational training

systems with Employment Insurance Programmes in 2003 ((Ku, 2001; Ku and Chen, 2001; Aspalter, 2001b:166; Kwon, 2005:14).

According to the Council for Economic Planning and Development, the active development of high technology industries has become a token to preserve economic stability in Taiwan (CEPD, 2009). Many high technology companies gained subsidies from government and these industries have developed rapidly. However, it has been argued that these policies appear to have a limited affect on structural unemployment or in creating working opportunities for Taiwanese, because most high-technology companies mainly manufacture products in mainland China and, even worse, the required new knowledge in these technology-intensive industries may exclude older workers from this labour market (Kuo, 2005; Chen, 2005a).

2.7 Family culture and gender patterns

In Taiwan, the underlying appreciation of family values, especially unity and cooperation in extended families, still exists and can be seen as a major driver of successful economic growth in current Taiwanese society (Davison and Reed, 1998:186). Lee et al. explain the high percentages of co-residency and extended families:

“Historically in Taiwan, there was a shared ideal of family continuity through the male line in which sons held a high degree of filial loyalty to their parents and, as ritualized through ancestor worship, to all preceding generations. In this ideal, parents should continue residing with married sons, and family property should be held jointly as long as possible”
(Lee et al., 1994:1011).

Filial piety combined with its emphasis on family unity seems to play an important role in terms of shaping the economic roles of older Taiwanese in families and society. However, some academics have argued that changing family structures may have shifted older people's family's roles, from being dependent to independent (eg, Vasoo, et al., 2000; Biddlecom, et al., 2002; Doling, et al., 2005; Chen, 2005a).

Filial piety, gender patterns and dependency of older Taiwanese

The notion of filial piety in this context refers to obedience and respect towards older people "including children's respect, obedience, loyalty, material provision, and physical care to parents" (Zhan, 2006:28); as Liu et al. (2003:149-150) say, filial piety not only "is the natural backdrop and starting point for any discussion of a cultural base for stereotypes of older people," but also governs inter-generational behaviour, by which younger generations are required to respect, care for and obey elders. According to a common traditional proverb in Taiwan, "*Of the hundred excellent things, filial piety is first*" (Jordan, 1998:267). By taking care of elders, the family's kinship solidarities are maintained with everyone being asked to "place his filial and kinships duties before all else" (Hsu, 1998:62-3).

Moreover, it is noted that Taiwanese society is traditionally very hierarchical. Jones (2003) elaborates, stating:

"It is the group not the individual that matters. The groups in question- families, corporations, entire societies – are structured hierarchically. They rest in principle on ascending orders of duty and obligation, and descending orders of responsibility and care. There is (or should be) a place for everyone; everyone should know his or her place and behave accordingly. It is only in the unique combination of his/her relationships to others

that the individual properly exists. So individuals are deemed to be possessed of roles and duties, never 'rights regardless'.....Seniority brings its just rewards with advancement up the hierarchy" (Jones, 2003:202)

The above statements also highlight the social rewards notion in-between generations.

Social rewards are often regarded as an appreciative attitude for someone's contributions in the past and sometimes might be accompanied with entitlement of benefits; based on social exchange theory, it is defined as "the pleasure, fulfilment, enjoyment and other positive emotions a person experience when involve in a relationship" (Kirst-Ashman, 2010:72).

In Western societies, where the virtues of independence are highly appreciated (Weeks and Cuellar, 1981:388), it has been noted that dependency in Western cultures is somehow an undesirable circumstance alongside various negative perceptions, such as loss of self-esteem and self-values thereby giving rise to conflicts between autonomy and dependency (Lewis, 1990:79; Baltes, 1996:7). In Taiwan, older people's family status and quality of life is largely dependent on their children's attitude and support, rather than the older person's economic status (Fan, 2007:496).

The practice of social rewards allows older people to rely on younger family members and to take advantage of family support in many East Asian countries (Tu, 1996; Walker and Wong, 2005; Goldman et al., 2006; Fan, 2007; Son et al., 2008; DSMIA, 1997 cited by Ku and Chen, 2001:107; Hill, 2009:xv). Thus, inter-generational dependency, in particular relying on the support of an adult, seems to be essential within these communities (Whyte, 2004:102).

In addition, a concrete gender pattern in relation to family hierarchy is also present. Cohen (1976) studied a farming village in South-western Taiwan and found that males have a higher

status in the Taiwanese family. Males were usually seen as the head of their families, and also the bread-winners; they determined the family's issues and the highest authority was the oldest men (McAleavy, 1955:540; Cohen, 1976:60; Davison, and Reed, 1998:10). More specifically, sons, especially the oldest, were normally expected to be the main supporters of their parents in both Japan and Taiwan (Davison and Reed, 1998:193; Maeda and Ishikawa, 2000:121).

Studies have observed that a preference for a son is still persistent in major Taiwanese and Chinese families so that "parents transfer *all* their assets to boys only, and girls often do not receive anything..... parents have a subjective weight difference toward their boys and girls" (Chu and Yu, 2010:139). As a result, sons are expected to carry out the caring responsibilities for their parents whereas married daughters traditionally lose membership of their natal families by joining their husbands' families (Brinton, 2001:21; Lee et al. 1994:1011).

In contrast to Taiwanese men, a woman's well-being is usually reliant on their married families (Jordan, 1998:269). The author of *Women and Family in Rural Taiwan*, quoting a conversation by a young widow in a rural area, described her observations of Taiwanese women's interpretation of family responsibility in relation to social rewards in old age:

"She answered 'I don't care about myself. If I don't eat well, it doesn't matter. I just want my children to do well, so that they can take care of me when I am old'" (Wolf, 1970:215).

Moreover, Hill (2009:xv) notes that "daughters-in-law" were the main carers for their husband's parents, which also means that daughters-in-law might have to bear the major caring responsibilities towards their parents-in-law rather than their own parents (Luo and

Zhan, 2012:74). Thus, it is observed that 'having a son or not' and 'being married or not' were fundamental elements with respect to older Taiwanese female dependency (Davison and Reed, 1998). Hence, the investment of children's education has been strongly emphasised in Taiwan. As Lee et al. (1994:1015) pointed out, "to shift resources from the older to the younger generation to finance increased investments in human capital" has been used as the major means of coping with structural changes in the Taiwanese labour market in the transition from an agricultural to an industrialised society. It has also been observed that older Taiwanese women usually put more emphasis on children's education and their husband's careers than older men (Goldman et al., 2006:85), and those who were highly educated were often seen as the most intelligent ones in society and were usually qualified to govern countries (Shils, 1996:48-49).

Apart from the influences of family structural changes or weakening family support, recent statistics still show that most Taiwanese elders live with their children, except for those who do not have opportunities to do so, for instance, if they did not have a child; or their children live in other countries; or they are constrained by limited living space. 49% of disabled older Taiwanese rely on their children for daily care and it has been found that 'being cared by children' was an admired option from the perspective of older Taiwanese (Ministry of Interior, 2011; Chan, 1992 cited by Bartlett and Wu, 2000:215). Moreover, the majority of older Taiwanese people agree that having the support of children guarantees a better later life (Luo and Chen, 2002:242-244; Fan, 2007:162).

Overall, the above statements seem to suggest that, when taking family responsibility as the major source of Taiwanese well-being into concern, younger males might carry heavier financial responsibility whereas females might be the main carers in their families. However,

as they grow older, it is assumed that both males and females can rely on the younger generations, and older Taiwanese males may become the authority in their families.

Older Taiwanese's independent roles in family

In the West, despite caring for dependent children, academics have found that Western parents might support young adult children economically, sometimes even more so if they are unemployed, have low incomes or are disadvantaged in some way (Allan and Crow, 2001:47; Cox, 2003:170; Berry, 2008:207). It has also been found that American retired parents have become an important financial resource for their adult children (Berry, 2008:235).

In East Asian NICs, as a result of traditional expectations of parenthood, elders quite often become economic resources for adult children (Keith et al., 1994:247). As the literature reveals, a father is also responsible for satisfying his son's needs in many respects, no matter how old his son is (Hsu, 1998:62-3; Whyte, 2004:114). Similar observations have been made by Whyte (2004:114), with Chinese parents usually continuously assisting their married children by providing money, childcare or helping their children to cope with life's difficulties using their personal networks. In Hong Kong, older people would usually share their houses with adult children, if their children cannot afford their own house, and they will take care of their grandchildren (Keith et al., 1994:251-2).

Therefore, when talking about intergenerational transfers, it seems that older Taiwanese are no longer one hundred percent dependent upon their families. Empirical data has shown that Taiwanese parents will indeed provide support for their children. For example, the Panel Study of Family Dynamics in Taiwan and China found that 25% of those aged 36-65

had received some form of support from both their living parents, lone mother or lone father in 2000 (Chu and Yu, 2010:223-5). As Chu and Yu (2010:224) discovered, transfers all of assets to adult children encourage them to behave in a more filial way to their parents and alongside increasing kinship pressure in Taiwan.

This seems to indicate that older Taiwanese sometimes supporter the younger generation rather than receive support. However, statistics show that the majority of Taiwanese elders are still more dependent on their families' support. Hermalin et al. (2002:306-307) show that relying on children's financial support was widespread, regardless of gender and marital status; in 1999, 52% of those aged 65 and over mainly relied on their children financially, and this might partly explain the absence of a universal pension system which could otherwise provide consistent income for retirees (Bartlett and Wu, 2000:216). Elsewhere, it has been found that 99% of older Taiwanese received financial support from their children, with 88% having been supported by their sons who, compared with daughters, more often supported their parents (Biddlecom et al., 2002:203).

Debates of being dependent or independent in modern families

Whether older people should rely on their family for support or be responsible for their own financial security is much debated. On the one hand, while taking changing family structures and attitudes into account, it seems that older Taiwanese as well as many other East Asians are no longer able to entirely rely on their children. In Singapore and Taiwan, it is noted that the shrinking family size and changing values has produced a negative impact upon the family's capacity and the willingness of younger people to care for older family members (Vasoo et al., 2000:182-183; Ku and Chen, 2001:100). Hill (2009:xv-xvi) argue that Confucian

family obligations might be incompatible with demographic changes, such as smaller family sizes, fewer children or significantly higher dependency ratios.

Hence, older individuals therefore might have to be financially independent of their children.

Qualitative research highlights the idea of guilt free reliance has experienced certain changes.

It has been found that older Taiwanese generally hoped to have filial children, but they often paradoxically told themselves to be independent of their children (Luo and Chen, 2002:244).

Further, because of rapid ageing, sharply declining fertility, shrinking family sizes, and changing working patterns, older Taiwanese are less likely to live with adult children or expect to rely on them for financial support (Hwang, 2001:245; Chen, 2005a; Chen, 2005b).

Therefore, as a result of the family's weakening ability to support their elders in a competitive modern society, older people are less likely to be to mainly rely only on inter-generational support (Biddlecom et al., 2002:186). They might therefore have to participate in the labour market longer, whether they are willing to do so or not; as Doling et al.

(2005:189) have shown, because of the lack of social benefits and the highly important self-assistance principle, remaining in work seems to be the only way to survive in many East Asian countries, Taiwan included.

On the other hand, however, other research has noted that filial piety and family values still have an obvious impact upon the younger generation's attitudes towards older people, as well as the implementation of a new ageing relation policy (Leung, 2005:78; Doling et al., 2005:194; Chen, 2008:185; Wada, 1995:5). A Hong Kong government investigation has shown that 58% of young people in Hong Kong still anticipate their children's financial support, even though they would have better financial security by having more savings or

participating in current pension schemes, compared with previous generations (Census and Statistics Department, 2002 cited by Leung, 2005:79).

In Taiwan, despite the fact that Confucian ideology has been influenced by Western thinking (Gold, 1996:258), it seems that parents still expect to be financially dependent on their children; as Lee et al. have argued, because they have firm beliefs about the benefits of inter-generational support, Taiwanese parents prefer to 'invest' more in their children's human capital in the modern industrial world in exchange for better financial support later (Lee et al., 1994:1037).

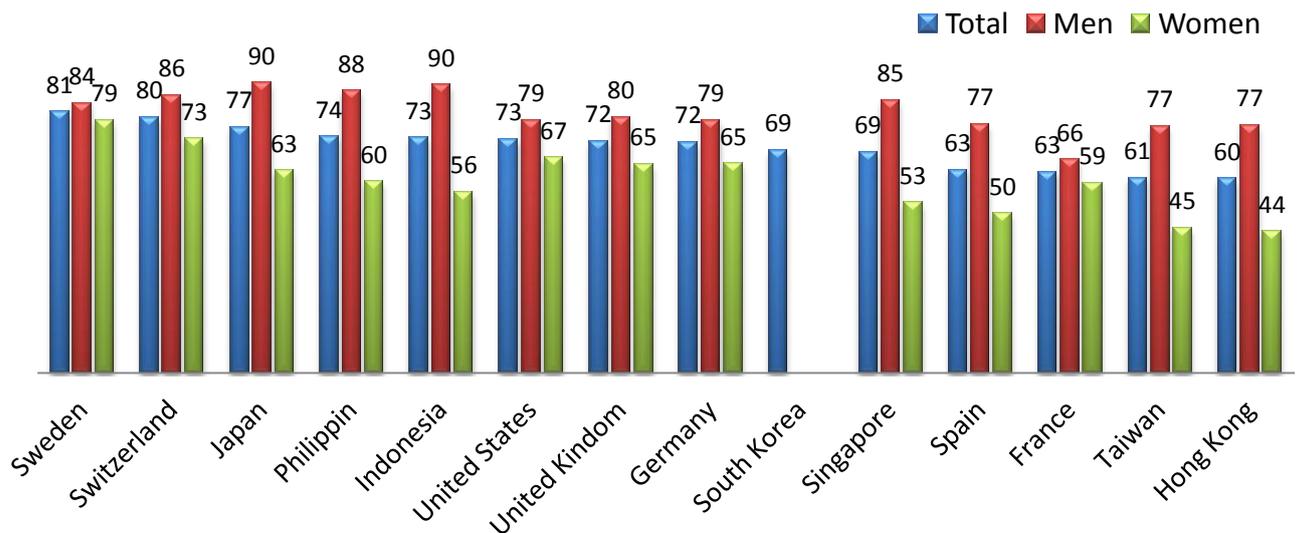
Most importantly, a number of studies regarding the stigma of older Taiwanese and East Asian workers has shown that to remain in an economically active status in old age was seen as a sign of their children's failure or a dysfunction of the older workers' family (see Keith et al., 1994:249; Fan, 2007:162-163) because working in old age was somehow against well-known public beliefs that "children are better able to provide the financial support necessary for aging parents to cease working" (Raymo and Corman, 1999:226). In this case, it is presumably those Taiwanese who want, or need, to remain in work during their old age and who might face these controversial problems. Indeed, evidence shows that older Taiwanese populations are less willing either to participate in the labour market or to take part in various social activities (Hsu and Chang, 2004). However, no current research can provide further information about whether or not the above mentioned conflicts contribute to reinforcing barriers to employment for older Taiwanese and, presumably, limit their labour participation rates.

OLDER TAIWANESE LABOUR PARTICIPATION AND EARLY EXIT CONDITIONS

2.8 Low LFPRs for the older Taiwanese

Statistics show that older Taiwanese labour force participation rates (LFPRs) have consistently remained at a rather low level, both for males and females. As Figure 2.2 shows, compared with Western countries, such as Sweden and Switzerland, older people's LFPRs in East Asian NICs were universally lower. Moreover, older LFPRs in Taiwan were almost the lowest among East Asian countries and only 1% higher in Hong Kong. According to the International Labour Organisation (ILO), older Taiwanese appeared to have the lowest labour participation rate among these countries, 61%, which was 20%, 17% and 12% lower than in Sweden, Britain, Japan and South Korea respectively (LABORSTA Internet, ILO, 2011; DGBAS, 2011).

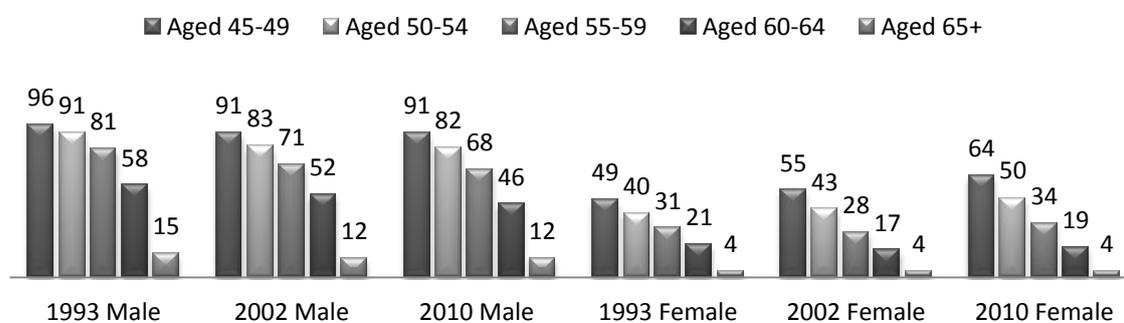
Figure 2.3 The LFPRs of the aged 45-64 in 2008 (%)



Sources: LABORSTA Internet, International Labour Organisation (ILO), 2011; DGBAS, 2011

Furthermore, with respect to gender differences, figure 2.2 shows that older female LFPRs were much lower than males; but that gender gaps were wider in South and East Asian countries; again, the LFPRs for the older females in Taiwan were the lowest, only 45%, when compared with 79% in Sweden, 67% in United States and 65% in United Kingdom. From the above, compared with these countries, it seems that labour participation in old age is consistently low in Taiwan, especially for females.

Figure 2.4 The LFPRs by age and gender in Taiwan (%)



Sources: DGBAS (2011)

As for changes in older people’s LFPRs by gender, as Figure 2.3 shows, female LFPRs have been continuously increasing from the 1990s, especially for females aged 45-49 and 50-54, which also corresponds with worldwide trends (Weaver, 1994). However, by contrast, older Taiwanese male LFPRs have gradually declined year-on-year, regardless of age.

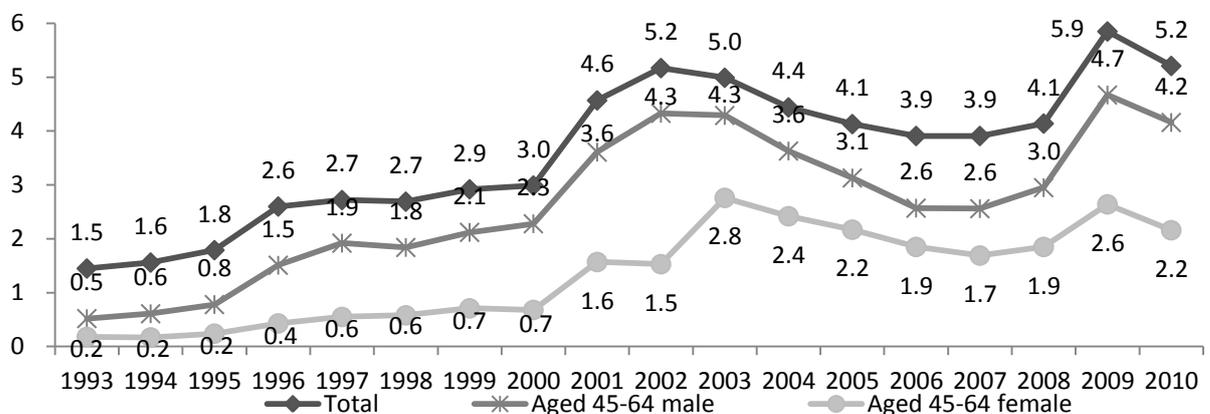
Figure 2.3 shows that older females are far less likely to remain in work compared to older males. Average older female LFPRs have increased over time; but the growing labour participation rates were mainly caused by young-older females whereas the LFPRs for those aged 60 and over were decreasing.

The above statistics seem to suggest that, despite comparatively low older female LFPRS, the decrease of older male LFPRs might somehow contribute to the resulting low LFPRs in Taiwan.

2.9 Low unemployment rates for older Taiwanese?

At the end of the 1990s, as a result of pursuing low human resource costs, thousands of factories shut down in Taiwan and moved to mainland China. Therefore, the first high peak in unemployment was in 2001/2002; a second peak was caused by the global financial crisis in 2008. Figure 2.4 compares Taiwanese unemployment rates by age and gender in recent decades; it shows that unemployment rates for those aged 45-65 were lower than average, but the rates for older males were generally higher than those for females.

Figure 2.5 Unemployment rates by age and gender (%)



Sources: DGBAS (2011)

However, this does not mean that older people were less likely to become unemployed compared with the younger generation; by contrast, as an official report highlighted, the lower unemployment rates of older Taiwanese could be seen as a result of their preference

to directly withdraw from the labour market rather than stay unemployed (BEVT, 2008:7). It was also discovered that older Taiwanese females were more likely to withdraw from the labour market citing reasons such as caring for older family members or grandchildren; therefore, official older female unemployment rates were significantly lower than those for older males, at 4.2% and 2.2% respectively in 2010 (DGBAS, 2011; BEVT, 2008:7).

With respect to periods of unemployment for older people, the possibility for older job-seekers to return to work continuously declined. The average number of weeks of unemployed for older workers increased from 17 weeks in 1995 to 24 in 2000 and 29 in 2007 (DGBAS cited by Fan, 2007:161; BEVT, 2008:7).

As Fan (2007:161) points out, with the exception of employer stereotypes, a lack of appropriate skills in combination with declining numbers of job vacancies in traditional industries were the major causes of prolonged job-seeking periods. Under these circumstances, as the official report indicates, in 2001, the numbers of workers aged 46-64 who withdrew from the labour market were twice as high as the same numbers in 2003; there were also more older females doing this, three times higher the males, mostly by 'fulfilling family responsibility' (DGBAS, 2011).

2.10 The early exit trend after age 55

In addition, it is found that an early exit seems to be a favourable choice among the Taiwanese. As a national survey in 2004 concluded, the percentage of Taiwanese who stayed in paid-work till 60+ decreased considerably from 74% in 1991 to 32% in 2004; the ratios of those retiring before the age of 50 increased significantly, from 16% to 27%, during the same period (DGBAS, 2004 cited by Chou and Tsai, 2006:80-81). Most significantly, the average

older male labour participation dropped continuously, from 82% in 1993 to 75% in 2010 (DGBAS (2011)). Consequently, academics have warned that the use of the older labour force was insufficient in this society and that employers will face challenges recruiting in the near future (Cheng, 2007:4-5; Fan, 2007:161).

In contrast to Western countries, there are not any generous early retirement programmes in Taiwan; however, public debate may take the lead to encourage early exit. As the Bureau of Employment and Vocational Training (BEVT) has argued (2008:6), the Taiwanese government and society potentially appreciates the early exit of older workers as a way to “make space for younger workers”.

Additionally, it was noted that the LFPRs in many Asian countries often dropped significantly after 55 (ILO, 2006). This sharp decline in LFPRs after 55, as Raymo and Corman observed, probably results from relatively younger mandatory retired ages, normally between 55 and 60, in these countries (Raymo and Corman, 1999:225).

According to the Taiwanese Labour Insurance Act, older Taiwanese workers who have worked for over 25 years or in specific occupations could apply to retire by 55, although the majority are required to work until 65 (BLI, 2009). This regulation might somehow cause a decline of the LFPRs among those aged over 55. Indeed, as figure 2.3 shows, the LFPRs for both older males and females significantly dropped before and after the age of 55, and the decrease in the LFPRs after 55 seem to be more apparent in recent years. For example, compared with a decrease of approximately 10% between the age groups 50-54 and 55-59 in both genders in 1993, the differences increased to 16% for females and 14% for males in 2010.

2.11 In summary

This chapter started by discussing the theoretical models and factors relating to older people's employment and retirement. A number of features were identified as having an influential impact that drive older people's decision making in their careers, such as: human capital, workability, employability, social capital and the ageing culture. Therefore, with the exception of older people's personal circumstances, for example, demographic characteristics, working skills and expertise, it is noted that older people's employment circumstances might also be associated with other non-individual features, or so-called contextual factors, such as employer considerations, political considerations, socio-economic factors (social policy interventions, the global economy and the structure of the labour market), relevant family factors, social networks and public attitudes towards working in old age (ageing culture).

Based on the above theoretical models, three dimensions of influential factors regarding older people's employment have been identified, including: individual factors, employer, relevant political and economic factors, and social-cultural factors. Moreover, some older workers might have similar employment difficulties in relation to their personal circumstances, such as educational qualifications, incomes, gender, caring responsibilities, and insufficient social networks.

Since the importance of contextual factors has been highlighted in the above, in the second part of this chapter, attention was paid to exploring the Taiwanese socio-economic context in depth. First, as a consequence of the global economy, it was found that economic growth has been the major focus of public policy. Therefore, although a number of universal welfare

regimes have been proposed in recent decades, the role of the Taiwanese government in relation to securing older well-being is limited. Instead, emphasis is on family responsibility and the rejection of welfare dependency (deriving from strong values of self-discipline and the virtue of self-assistance) could be seen as significant characteristics in the Taiwanese social policy context. Thus, it is noted that co-residency across generations is popular in Taiwan.

With regard to the Taiwanese economic context, second, the labour market has experienced a number of significant structural changes, e.g. from Fordism to post-Fordism, from a labour-intensive to service sector and knowledge based economy. Consequently, jobs in service sectors have increasingly grown along with a decreasing manufacturing sector.

Unemployment rates have increased significantly and remain at high levels. High technology industries have developed considerably as a means of maintaining the nation's competitiveness; however, it has been argued that the effects regarding regaining working opportunities might be limited and, worse, the new skills needed might constrain the employment possibilities of older Taiwanese's.

Moreover, family culture and gender patterns were also emphasised. Distinguishing characteristics, such as the appreciation of filial virtues, older people claiming social rewards, (older) males as head of families, (older) females contributing to their husbands' families and relying on sons' support, are all important considerations. Likewise, the roles of older Taiwanese in families show that they are not purely dependents; in many cases, they are also expected to support their adult children. Moreover, it is noticed that structural changes in the family have weakened its support for older family members. However, the majority of

Taiwanese are still keen to rely on their children financially so that working in old age might be judged as having a dysfunctional family.

The rates of the labour participation of older Taiwanese remained continuously at a very low level compared with Western and other East Asian countries. Statistics show that unemployment rates among older Taiwanese remained at a low level, but many unemployed older Taiwanese tended to withdraw from the labour market, especially older women. Furthermore, it appears that the number of older Taiwanese who exited from the workforce after the age of 55 increased considerably in this decade. Hence, taking the ageing labour force into consideration, this situation might deteriorate, creating potential risks regarding the insufficiency of labour. However, it is noticeable that Taiwanese society and government do not appear to be fully aware of the negative consequences of early exits among older workers; instead, it is probable that they appreciated it as a way to 'make room for younger workers'.

The next chapter will describe the methodology selected for this research.

3 METHODOLOGY

3.1 Introduction

This research explores the reasons why there are low labour participation rates among older Taiwanese with respect to individual and socio-economic contexts. This chapter provides a justification of the methods employed. It begins by explaining the practicability of the research and addressing debates on quantitative and qualitative methods in order to explain why a mixed-method approach was chosen for this thesis. Moreover, the reasons for adopting secondary data analysis to answer research questions and how case managers within the PESS to be interviewed using semi-structured interviews were chosen will also be described. In the final part, details of the mixed-methods approach used to collect and analyse data will be described.

3.2 Rationale of methodology, research design and practicality

Methodology is the theory or discipline of how inquiry should proceed. It should enable researchers to design research as well as to decide on research methods (Perri 6 and Bellamy, 2012). For instance, positivists prefer using methods from the natural sciences to understand the objective reality of social life; by contrast, interpretivists emphasise the subjectivity of the meaning of social behavior (Bryman, 2008). In social scientific fields, quantitative methods are often employed by positivists, whereas qualitative methods are often employed by interpretivists. Due to different philosophical assumptions and data-collecting methods, there have been debates over the incompatibility between quantitative and qualitative methods over the last few years (which will be discussed later).

However, in recent years, it has been argued that the decisions of research design should not be over-occupied by methodological debates; instead, it is believed that researchers may decide their positions by “the truth [of] value of their data” and “the identified data patterns” (Bergman, 2008:16). As Creswell and Clark (2007) state, using mixed methods, defined as a research method, can establish a more comprehensive understanding of the research questions than only using either a quantitative or a qualitative method. Indeed, Bryman (2008:93) analysed 232 mixed method studies and found that the “completeness” (of research enquiry) and “enhancement” (of the findings from either quantitative or qualitative method) have been frequently cited as the researcher’s rationale and practical principles. Moreover, the question–method fit, also called the pragmatic approach, is put forward as another solution for designing research appropriately and to remind us that research questions should take a lead in deciding research methods. As Punch (2009:20) points out: “... not all questions for social research are driven by paradigm considerations, and that different sorts of questions require different methods for answering them”.

Overall, this research adopts the question-method fit approach and looks for pursuing completeness and enhancement as well, because reasons resulting in low labour participation rates among older Taiwanese are presumably very complex. These research questions indeed cover both micro (individual) and macro (social policy, economic and culture) aspects. The first theme aims to identify distinct types of older workers, which may suit statistical comparison. One major aim of the last theme is to explore meanings in a socio-economic context, so a qualitative method is more fitting here (more details of research design below).

In addition, before detailing how the research methods were employed in this research, it is important to justify the research feasibility and practicability, which are seen as determining issues at the beginning of any research (Pole and Lampard, 2002). According to the literature, the deciding on a research topic should cover various dimensions, such as: “sources of research topics”, “academic requirements”, “sponsorship and networking”, “time available”, “capabilities and experiences”, “examining our own strengths and weakness”, “career goals” ...and so forth (Gary, 2004:36-42). Cummings et al. (2007) state that, “feasibility, interesting, innovation, ethical considerations and relevance with social research realms are key concerns as well”.

Accordingly, a number of check lists about the practicality of any research have been designed for researchers. For instance, Denscombe (2003:5) lists six items that have been identified as key concerns for small-scale social research: “relevance, feasibility, coverage, accuracy, objectivity and ethics”. Cummings et al. (2007:19) have designed a check list with clear sub-check lists as a means to stimulate further thoughts about research practicability (see Table 3.1). Generally speaking, my original research design was fixed using the major items in this check list, but I was reminded that more considerations of feasibility should be taken into account.

In terms of research design, feasibility in relation to time, budget, as well as accessibility of data, are often considered to be crucial issues (Alder and Clark, 2011; Denscombe, 2010; Cummings, 2007; Henn et al., 2006). It is commonly suggested that the scope of a practicable research should be affordable and allow researchers to complete on schedule. Indeed, in this case, it would be much easier if I chose to study older Taiwanese employment

barriers from one single perspective, such as: individual factors, economic factors, or social aspects. Or, it could also have saved much time and travelling budget if I had decided to do only quantitative or qualitative analysis, or just selected one PESS as a case study.

However, the concern for feasibility should count more than the expected contributions of each social research project and ambitions towards achieving sophisticated research. As Henn, et al. (2006) argue,

“The exciting, yet expensive, research ideas have a greater likelihood of approval than a proposal that is considerably cheaper, but is nonetheless not as inspiring. Feasibility is an important criterion..... but it is nonetheless a relatively low-level one”.

In other words, the quality and originality of the social research project should be seriously addressed beyond the considerations of feasibility. Reflecting on the research background in this research, as mentioned above, it is rare for Taiwanese researchers to have comprehensively examined the points of views in this field, but only focused on either the effects of individual factors or of economic changes (e.g. Xue, 2000; Tseng, 2002; Chang and Lee, 2001). It is unlikely that such a segmented understanding of the barriers to the employment of older Taiwanese can effectively benefit further policy making. Therefore, adopting a broader focus to investigate reasons consistently reducing older Taiwanese employment rates is identified as a crucial target in this research. Consequently, both quantitative and qualitative methods are employed here; discussions of the benefits of using mix-methods are offered below.

However, concerning the limited time and money in relation to research design, it is true that narrowing down the research scope in a reasonable way is necessary here. Overall, I

have modified my research scope to take into account concerns about feasibility. First, after doing some statistical analysis about regional diversity of working industries, I decided to narrow my research scope to make it more feasible (also see 3.8 sampling strategies). Second, the way of conducting the quantitative analysis was shifted from comparing data in various years to doing a single year in depth (see 3.5). More details about other concerns of the practicality of my research design are described in Table 3.1.

After the practicality of this research was checked, the next important decision was the kinds of research methods that could answer the research questions. The following addresses why a mixed-method approach was chosen, with the justification being on the basis of a deeper understanding of the debates between quantitative and qualitative approaches and the rationale for using a mixed-method approach.

Table 3.1 FINER Criteria verse research designs in this research

Criteria	Checking items	Yes	Modi-fied	Description
Feasible	Adequate number of subjects	☉		Being a formal social workers' supervisor in one of the PESCs, it is beneficial for me to access the research subjects and the official database
	Adequate technical expertise	☉		I accepted basic and advanced qualitative and quantitative methods training.
	Affordable in time and money		☉	Considering my limited budget and time constraints, as well as the remarkably wide regional differences in industrial structure between east and west Taiwan, I decided to focus on west Taiwan and use secondary data analysis to answer research questions one to three.
	Manageable in scope		☉	
Interest	Getting at the truth of the matter is interesting	☉		For more description of my personal interests in this research, see the chapter 1; moreover, my interests in this research were also shared by the participants in the pilot interviews.
Novel	Confirms, refutes or extends previous findings	☉		The novelty of this research mainly lies in using mixed-methods to examine the limitations to the employment of older people from general to specific perspectives, as well as exploring perceptions of this topic at the micro level.
	Provides new findings	☉		
Ethical	Amenable to a study that institutional review board will approve	☉		Ethical reviews have been approved by the Institution of Applied Social Studies, University of Birmingham, Oct/2008
Relevant	To [social] policy	☉		It is believed that this research will provide evidence and suggestions on how to removing older Taiwanese' employment barriers which will become an important policy agenda in this ageing society.
	To future research	☉		Various research topics could be further addressed; for example, how to reform the current PESCs to increase its effectiveness in promoting older people's employment prospects and how to tackle the potential negative effect from economic and social trends, etc.

Source: Cummings et al. (2007:19-22)

3.3 Debates between quantitative and qualitative research

It is known that social researchers are usually interested in understanding individual minds within a social and cultural context, whereas natural scientists might study human brains in order to know their 'minds' (Hughes and Sharrock, 1997:98). So the process of social research is therefore more unpredictable and requires more flexibility (Pole and Lampard, 2002). Both quantitative and qualitative approaches have been widely used separately in social research fields for many years. It is suggested that qualitative researchers are more interested in attitudes, values and perceptions as well as in considering the social-economic context, while quantitative researchers are more inclined to categorising and measuring research subjects (Snape and Spencer, 2003; Neuman, 2003; Matthews and Ross, 2010).

Hence, quantitative researchers often asked numerical questions, such as how much? or how many? In contrast, qualitative researchers have been more concerned about questions like, what does it mean? (Dey, 1993). Brannen (1992:5) argues that qualitative research is more suitable for answering "less clear-cut" and complex questions, but that quantitative research might be expected to offer more specific answers. There is a wealth of literature that discusses the distinguishing characteristics of the two approaches and a number of comparisons are shown in Table 3.2.

Table 3.2 Distinguishing characteristics between quantitative and qualitative approaches

Characteristics	Quantitative approach	Qualitative approach	Resources
Research philosophy	Functionalism, positivism	Postmodernism, interactionism	Bryman, 1988, 1992; Silverman, 1993; Hughes and Sharrock, 1997; Daly, 2003; Creswell, 2009
Ways to produce knowledge of social life	Examining hypothesis (causal relationships between variables); numerical measurement	Understanding social phenomenon in depth;	Bryman, 1992; Brannen, 1992; Dey, 1993; Silverman, 1998; Trigg, 2001; Daly, 2003; Neuman, 2003; Creswell, 2009
Main goal	Generalisation (to evidence the relationships between variables is a general set in social life)	Configurations (Seeking meanings in context)	Dey, 1993; Brannen, 1992; Daly, 2003; Snape and Spencer, 2003; May, 2003; Bryman, 2008
Approaches toward developing theory	Deduction	Induction	Brannen, 1992; Daly, 2003;
Data collection and analysis	More structured, inflexible, and prearranged; statistics; could be large-scale	More flexible and developing; Interpretation and conceptualisation; usually small-scale	Bryman, 1988, 1992; Brannen, 1992; Dey, 1993; Daly, 2003; Snape and Spencer, 2003; May, 2003;
Involvement of researchers in researching fields	Lower; value-free; might have power-gap between researcher and participants	Higher; value-valuable; having little power-gap between researcher and participants	Trigg, 2001; Snape and Spencer, 2003; Mahajan, 1997; Kumar, 2011
Criteria of quality of social research	Reliability, validity and objectivity; replication	External validity; subjectivity; little concerns of replication	May, 2003; Hall and Hall, 1996; Kelly, 1998; Matthews and Ross, 2010

Table 3.2 suggests that, as a result of different research philosophies and goals, quantitative methods usually require a relatively structured research process and researchers' objective position and it emphasises generalising from valid and replicable facts; qualitative methods, meanwhile, offer a way to produce a deeper and comprehensive understanding of research

subjects within a complex social context, and these require the active involvement of the researcher and flexible research designs. Two fundamental debates between quantitative and qualitative approaches have been identified by Bryman (2008:606) as “the paradigm argument” and “the strength of data-collection and data-analysis techniques”; the first debate lies on opposite assumptions made about the nature of this world by the two approaches, so that the research principles are incompatible; the second refers to different considerations of the best method to produce knowledge of this social world (also see Silverman, 1993; Tashakkori and Teddlie, 2003; Creswell, 2009).

Recently, some of the above distinguishing characteristics between the two approaches have been challenged; for instance, Bergman (2008:16) points out that some qualitative research has involved a large number of participants, while some existing quantitative research has a rather small scope. Hall and Hall (1996:43) argue that quantitative results are unlikely to achieve actual “external validity” in this complex social world; by contrast, extracting knowledge from interview data might have high external validity due to the nature of the breadth of information. Bryman (2008) further reminds us that there is rarely a perfect association between two variables in quantitative approach in the real world.

Therefore, there are more academics persuaded that research questions, aims and contexts should be based on the research methods employed (Gary, 2004; Bergman, 2008; Creswell, 2009; Sandelowski, 2000). Also, the importance of the context in different aspects should not be ignored; as Bulmer (1984:6) states, considerations of research methods “..... should always be viewed in the context of the problems and theories which they are used to illuminate”, and it is suggested that researchers’ organisational contexts also need to be

involved in the decision making process (Hall and Hall, 1996). Indeed, Hammersley (1992) examines a number of divisions between the two methods and argued that it was unnecessary to be strictly limited to the adoption of one method on certain types of research subjects; instead, “the purposes and circumstances of the research” should be seen as the prior concern, rather than rigidly follow methodological rules. Denscombe (2003:7) also has the same opinion, stating that “the survey approach is a research strategy, not a research method. Many methods can be incorporated in the use of a social survey”.

In brief, it is likely that decision making in research design, as well as data collection methods, should depend on the kinds of answers research questions are seeking; therefore, it is possible and to use mixed-methods in a single social research. In the following, the rationale and strengths of using mixed methods will be discussed, and, most importantly, how this method will be used to achieve the research aims and answer research questions.

3.4 Mixed methods and research designs

“Research methods are much more free-floating than is sometimes supposed” (Bryman, 2008:588).

In recent decades, a tendency to use mixed methods approaches, combining both quantitative and qualitative methods, has increasingly appeared in social research (eg, Brannen, 1992; Hammersley, 1992; Bryman, 1998; Tashakkori and Teddlie, 2003; Creswell, 2009). This has been referred to as *triangulation*, specifically with regard to using different tools to collect data (Bulmer, 1984; Neuman, 2003; Denscombe, 2003; Bryman, 2008). In a few cases, there are still technical disputes about how best to combine these two research

methods. For example, criticisms have been made that some mixed methods research does not properly take advantage of 'mixed' methods but are inclined to use largely either quantitative or qualitative methods (Bergman, 2008). And warnings have been made that research findings derived from different methods might conflict with each other (Huby and Dix, 1992 cited by Pole and Lampard, 2002:30). However, as mentioned above, the research design depends on the research questions, aims and both the context of the researcher and subject, so that it might be acceptable to put different weights on each research method in some circumstances. It has also been suggested that divergent findings from different data could enrich the research findings (Pole and Lampard, 2002), and, as Bryman (1988:134) points out, controversial findings between different methods may "prompt the researcher to probe certain issues in greater depth, which may lead to fruitful areas of inquiry in their own right".

In practice, the strengths of using mixed methods in social science enquiries have been broadly valued. For example, it is suggested that "evidence from two sources is intuitively more persuasive than evidence from one" (Brewer and Hunter, 1989:18) ; as McKay (2011:27) asserts, "having a plurality of methods is a strength of the discipline"; similarly, Gary (2004:33) suggests that applying multiple ways in a social research could "balance out" the weakness and strength in each research method; Ritchie (2003:38) points out that this method could generate "a powerful resource to inform and illuminate policy or practice" and Britten et al. (1995:105-6) make the case that the combination of multiple research approaches could enhance the comprehensiveness of research findings (see also Creswell and Plano Clark, 2007). Moreover, Tashakkori and Teddlie (2003:14-5) stress that using mixed-methods is able to address research questions which cannot be fully answered by

using only one method by “providing better (stronger) interference” and “presenting a greater diversity of divergent views”.

Since the strengths of using mixed methods approach are recognised above, the next concern should be how to combine qualitative and quantitative methods in a way to increase the credibility and validity of findings. Undoubtedly, a fitting link between research aims and methods is likely to be the key element, so that the arrangement of research methods might be driven by research aims (Newman et al., 2003). Therefore, the question that arises here is: what will be the proper combination of research methods and questions for this research? Before answering this question, a greater understanding of the various types of mixed-methods approaches is helpful. Matthews and Ross (2010:145) have argue that qualitative approaches could be used “before” (to map the research concepts), “alongside” (to answer the same or different questions and gain diverse findings) or “after” (to seek underlying perceptions or issues to extend understanding of the quantitative results) quantitative approaches (see also Ritchie, 2003:40-3). Likewise, Bryman (1992) gives a holistic picture of mixed-methods research and provides details of the advantages within the different approaches (see Table 3.3). Based on Bryman’s work, it seems that the kinds of roles that quantitative and qualitative methods play in social research are the key concern to determine how to combine these two methods.

Table 3.3 Approaches to integrating quantitative and qualitative research

	Approaches	Advantages
1	The logic of triangulation	The findings from one type of study can be checked against the findings from the other type.
2	Qualitative research facilitates quantitative research	Qualitative research may help to provide background introduction on context and subjects; act as a source of hypotheses; and aid scale construction.
3	Quantitative research facilitates qualitative research	Usually, this means quantitative research helps with the choice of subjects for a qualitative investigation.
4	Quantitative and qualitative research are combined in order to provide a general picture	Quantitative research may be employed to plug the gaps in a qualitative study which arise because of, for example, the researcher cannot be in more than one place at any one time. Alternatively, it may be that not all issues are amenable solely to a quantitative investigation or solely to a qualitative one.
5	Structure and process	Quantitative research is especially efficient at getting to the 'structural' features of social life, while qualitative studies are usually stronger in terms of 'processual' aspects. This strength can be brought together in a single study.
6	Researchers' and subjects' perspectives	Quantitative research is usually driven by the researchers' concerns, whereas qualitative research takes the subject's perspective as the point of departure. These emphases may be brought together in a single study.
7	The problem of generality	The addition of some quantitative evidence may help to mitigate the fact that it is often not possible to generalize (in a statistical sense) the findings deriving from qualitative research.
8	Qualitative research may facilitate the interpretation of relationships between variables	Quantitative research readily allows the researcher to establish relationships among variables, but it is often weak when it comes to exploring the reasons for those relationships. A qualitative study can be used to help explain the factors underlying the broad relationships that are established.
9	The relationship between 'macro' and 'micro' levels	Employing both quantitative and qualitative research may provide a means of bridging the macro-micro gulf. Quantitative research can often tap large-scale, structural features of social life, while qualitative research tends to address the small-scale, behavioural aspects. When research seeks to explore both levels, integrating quantitative and qualitative research may be necessary.
10	Stages in the research process	Quantitative and qualitative research may be appropriate for different stages of a longitudinal study.
11	Hybrids	The chief example tends to be when qualitative research is conducted within a quasi-experimental (i.e. quantitative) research design.

Bryman (1988, cited by Bryman, 1992:59-61)

This research seeks to answer the primary question ‘**What are the circumstances, barriers to and meanings of employment for older people in Taiwan?**’, and covers three themes and seven sequential questions (see Table 3.4). The initial two research questions and part of the third question relate to generalising the associations between variables (individual factors versus employment circumstances and employment barriers), and the latter questions attempt to seek explanations for these associations within either economic or social contexts. Moreover, how social contexts shape the meaning of older Taiwanese employment will also be examined.

Thus, reflecting on the distinguishing characteristics between quantitative and qualitative approaches (see Table 3.2), in this research, the quantitative method will be employed first (for research questions one and two, influential factors and factors concerning employment circumstances and barriers) and alongside the qualitative method (for research question three, employment barriers). Qualitative data from the semi-structured interviews will be employed to answer research questions four to seven.

Overall, this research design fits with two of Bryman’s approaches from Table 3.3, “8.

Qualitative research may facilitate the interpretation of relationships between variables” and “9. *The relationship between ‘macro’ and ‘micro’ levels.*” Explanations of links between this study’s research questions, aims and sources are illustrated on Table 3.4.

Table 3.4 Research questions, aims of each question and research sources

Research questions	Aim of each research question	Research sources
1. What individual factors have impacted on the employment circumstances of older Taiwanese workers?	Examines factors which determine older Taiwanese's employment circumstances	Secondary analysis of public documents and official data
2. What are the characteristics of older workers who share similar problematic employment circumstances?	Explores relationships between individual factors of older Taiwanese and their problematic employment circumstances	
3. What factors influence the employment barriers among different types of older Taiwanese workers?	Explores those barriers that limit older Taiwanese' employment probability	Secondary analysis of public documents and official data/ Semi-structured interviews
4. What factors have case managers evidenced as employment barriers?	Explores what fundamental barriers limit older Taiwanese' employment from the street-level perspective	Semi-structured interviews
5. Which economic and social policy contexts shape the barriers to employment for older people?	Identifies underlying influences of economic, social policies and social contexts in terms of older Taiwanese's employment circumstances and meanings of their employment	Semi-structured interviews
6. How do social contexts shape barriers to employment for older people?		
7. How is the meaning of employment in old age constructed in social contexts?		

CONDUCTING THE QUANTITATIVE STUDY

As Table 3.4 shows, this research will use a quantitative approach to answer research questions one, two and part of three through secondary analysis. This study aims to examine the barriers to employment for older people in relation to individual factors within the Taiwanese context by using quantitative methods; this section seeks to explain why secondary analysis, rather than collecting primary data was chosen, and how these data were accessed and analysed.

It is noted that collecting primary quantitative data should cover all of the variables of interest (Bryman, 2008), and results might be inferred to the whole targeted population if using rigid “probability sampling” strategies (Burton, 2000:308). However, the benefits and usefulness of using secondary data are also highlighted; as HaKim (1982:1) argues, “original research can often be done with ‘old’ data”, and further study of existing data can not only produce extra knowledge but also illuminate potential research topics for some specific subjects.

Moreover, a number of concerns were emerging that suggested the reanalysing of large official data sets might be productive in this research. The first and most concern regarding the feasibility and availability of research sources are highlighted as issues in social researches (Gary, 2004; Cummings et al., 2007). It is less likely that any single researcher can access all representative Taiwanese samples and accomplish a large amount of data collection, especially when budgets and time are limited. Even if money and time were sufficient, it is not possible to conduct an individual survey using a stratified random sampling to determine that “the resulting sample will be distributed in the same way as the

population in terms of the stratifying criterion” (Bryman, 2008:173). Generally speaking, it is less likely that the representativeness of an individual private study could be as rigorous as a national official survey and it is inappropriate to do so, if a wealth of relevant information had already been produced by official databases (Slater, 1998).

Second, official data, especially census surveys, usually contains rich information concerning a population’s living conditions, attitudes, etc., which are employed as statistical evidence to formulate or support policy decisions (Hakim, 1982; May, 2003), and it is assumed that the quality of official data will be better than other private ones (Hakim, 1982; Pole and Lampard, 2002). The characteristics of official data, such as the breadth of coverage, the extensiveness of gathered information and the validity of generalisation, often lend its findings as evidence for further public policy developments which can facilitate new research aims (Miller, 2003; May, 2003; Slater, 1998). Most significantly, as Neuman (2003:318) points out,

“...existing [public] statistics research is appropriate where a researcher wants to test hypotheses involving variables that are also in official reports of social, economic and political conditions”.

Therefore, it seems that there is no need to design a questionnaire here, because using existing official data is arguably a valid and comprehensive way to approach my research aims. However, there are limitations to using official data, but these have been moderated. First, stereotypes and institutional assumptions might influence the construction of official surveys (Brewer and Hunter, 1989). It is therefore crucial to pay attention to how official researchers define the kinds of questions that should be asked in order to fulfil their research. These concerns are less likely to become an issue in this research because it

mainly focuses on comparisons between older people's demographic factors and their working experiences/opportunities; the former, such as gender, age, educational qualifications, and living regions, are general terms and the classification of the latter, such as occupation and industry worked, are usually based on a worldwide standard, the *ISCO International Standard Classification of Occupations* (ILO, 2004), and is less likely to be manipulated by any single government.

Second, researchers who use official data might encounter difficulties in answering all research questions due to their having very limited control of the variables in the existing data (Miller, 2003; Neuman, 2003). In practice, it is suggested that this shortage might be partly overcome by computing/recoding original variables into "derived variables" (Slater, 1998:200). Indeed, a few initial constraints in terms of using the Statistics of Employment Services and the Taiwanese Annual Manpower Survey were found here; for instance, statistical findings from the Statistics of Employment Services could not be inferred as representative conditions for all unemployed older workers but only for older employment service receivers. However, it is still believed that having a complete understanding of this data could offer readers insights into unemployed older people's job-seeking conditions on the frontline. Also, it is noted the Taiwanese Manpower Survey did not carry very much information about the barriers to employment faced by older Taiwanese in relation to their socio-economic contexts; but, since this research is using mixed methods, it was believed that more in-depth information from qualitative data will supplement any insufficiency in the quantitative analysis.

3.5 Introduction to official data used

Two types of official statistical data were selected for this research; the first was **Statistics of Employment Services**; it is published regularly online by the BEVT either in PDF format or Excel for every month and year. The BEVT is one of the central governmental institutions responsible for making employment policies and programmes and it is also in charge of all local Employment Service Centres (ESC) and Stations. These statistical data present all results from the public employment services, including utilisation of working opportunities and workers' job-seeking conditions in the PESS. Some working opportunities are unable to be included in the PESS, for instance, a few employers might publish their working vacancies only on their websites or on social networks.

Practically speaking, this database is usually used as a simple demonstration of the PESS's performance (mainly focussing on how many job-seekers have found jobs or how many employers had found their employees). However, little research has been done with this dataset as information on the 'perceived' demand and supply side in the front-line level. Accessibility to this dataset is open and is basically an open-downloaded dataset on the BEVT's website, "Statistics of Employment Services" (BEVT, unknown). The details of working opportunities or job-seekers do not contain any individual information and agreements for the dissemination of this information which have been made between the government and employers beforehand; therefore, it is open-access downloadable data.

The second is the statistical dataset, *The Annual Manpower Survey*, which is carried out regularly by the central official statistical institution, the Directorate-General of Budget, Accounting and Statistics (DGBAS). It adopts a two-stage stratified random sampling method,

covering all administrative units in Taiwan; its results are usually used to represent the labour force supply side in Taiwan (for further details see APPENDIX 9.1). Accessibility of this dataset is rigorous due to ethical considerations for its participants. To apply to use this dataset, I prepared a number of documents, including student certification, a research proposal and an agreement of ethical requirements, and then sent them to the Survey Research Data Archive (SRDA website: <https://srda.sinica.edu.tw/>); after a short period, I was given a personal account and password to download the raw data.

Considering this data set has been consistently published over a period of years, I decided to download data for the last ten years, because I believed that it might be useful to understand the fundamental changes within the labour market. Meanwhile, it was presumed that the structural changes might have had an impact on the working opportunities of older Taiwanese.

In fact, I compared the changing percentages of employee occupations, education, and incomes and so on. However, I found that the published reports had detailed this information; therefore, it seems to be unnecessary to do these comparisons.

Moreover, despite of some questions having been amended over years, I found that rechecking definitions for each variable in different years as well as recoding them into comparable variables were extremely time-consuming jobs. As a result of time pressure, I was afraid that I could not comprehensively complete the quantitative analysis to compare various years. Thus, I decided to only focus on the latest dataset in the quantitative analysis, and instead to explore how the structural changes had influenced the employment of older Taiwanese through semi-interviews.

3.6 Analysis of quantitative data

The statistical analysis of the quantitative data in this research was undertaken in two parts, dependent on the format of the available dataset. First, with respect to the Statistics of Employment Services, most of the analysis was done on Microsoft Office Excel 2010, as the available data was provided as either a PDF or an excel file. In this part, a crosstab analysis of the factors influencing the demand and supply sides of the labour force within the PESS was used.

Second, the data from the Annual Manpower Survey 2008 was analysed using the statistical software package, SPSS, because the original data is compatible with this software. At the beginning, a number of frequency tests and crosstab analyses among all the populations were carried out in order to familiarise myself with the existing variables, which were seen as an essential step in addressing the potential limitations of the secondary dataset, “lack of familiarity with data” (Bryman, 2008:300). Afterwards, some variables were re-coded or computed as derived variables in order to correspond with this research’s required variables (Slater, 1998:200).

Responding to the research questions, a number of questions from this survey were selected; these were grouped into two categories: A. current/previous employment circumstances; and B. expectations and difficulties to work. Within each category, relevant questions were chosen (see Table 3.5).

In category A, the main focus is employed/unemployed/economic inactive older workers’ current/previous work experiences. A number of questions were chosen, including working

positions, industry and mode of working enterprises in their current/last job; moreover, questions about job changes among employed workers were chosen, too. In this section, the relationships of older people's individual factors and employment circumstances are compared in order to group older people by similarity and dissimilarity of their employment circumstances.

In category B, the main interest is to understand the barriers to employment for unemployed older workers in different contexts; expectations and perceived employment barriers; and how these variables related to personal characteristics.

Moreover, employment barriers between the identified groups of employed older people will be compared in order to examine whether there are any similarities between subgroups or not.

Table 3.5 Selected questions from the Annual Manpower Survey 2008

Groups of questions	Survey questions
<p>A. <u>Current/previous employment circumstances</u> Working positions Working industry Mode of working enterprises Job Change</p>	<p>Q1 What was your occupation in your current/last job? Q2 What was your working industry in your current/last job? Q3 How many employees were in your current/last company? Q4 How many time had you change your jobs in 2007/8? Q5 How much is your working income, hours and positions? Q6 What was your last occupations, working industry and mode of employees? (for those employed)</p>
<p>B. <u>Expectations and difficulties to work</u> Reasons for being non-employed Motivations to work Barriers to gaining employment Expectation of the next job</p>	<p>Q1-1 Why did you leave your last job? Q1-2 Why did you decide not to work? Q2-1 Have you started to seek employment yet? Q2-2 If there was an ideal job available to you, would you go for it? Q3-1 Possible reasons for giving up a job offer? Q3-2 What are your main barriers to employment? Q3-3 What would prevent you accepting this ideal job offer? Q4 Expectations of future? jobs (including working time, occupations, and wages)</p>

Apart from being unfamiliar with existing data, another well-known disadvantage of using secondary data is unable neither to control the variables nor expect the asked questions totally fixing with the later researches (Miller, 2003; Neuman, 2003). Indeed, because the Taiwanese Manpower Survey mainly focuses on populations who are accounted as labour forces, rare questions are designed for older people who claimed themselves as retirees or economic inactive people.

Therefore, these older populations' previous working history and considerations of possibility to work in later life remain in unknown. Moreover, the questionnaire did not contain attitudes and pension relevant questions, so that the quantitative analysis is obvious limited and only bases on questions which have been included in this survey.

CONDUCTING A QUALITATIVE STUDY

As Table 3.4 shows, this research will use qualitative methods to answer part of research question three and questions four to seven. The following will explain why semi-structured interviews were used; the sampling strategy and recruitment of participants; lessons from two pilot studies; and the data analysis.

Semi-structured interviews were chosen because they could facilitate the researchers to “combine structure with flexibility” (Legard et al., 2003:141) and “seek both clarification and elaboration in the answers given” (May, 2003:93). This approach allows researchers to probe further specific opinions and perspectives according to the interviewees’ descriptions (Gray, 2004) and, according to the interview guidelines, conversations between interviewees and interviewers could not only be flexible but also relate to the major topics (Leonard, 2003). Therefore, in order to extract rich enough information to answer the research questions, semi-structured interviews seemed to be a suitable data collecting method.

3.7 Decision making of participants

When thinking about who should participate in this research, older Taiwanese automatically come to my mind because they were the main target population in this thesis. However, this research is not only interested in the individual level, but also focuses on how the Taiwanese social, economic and policy characteristics have contributed to limit the barriers to older individuals’ employment. As Ritchie et al. (2003:87) indicates,

“The appropriate population may be obvious, but often it will be necessary to think through the roles, knowledge or behaviour of different groups and their ability to shed light on different aspects of the research question”.

Interviewing older people might not therefore fully answer my research questions if they rarely think about how the governmental economic concerns or practices of employment policies have influenced their employment barriers.

Instead, by borrowing concepts from Lipsky’s street-level bureaucracy (1980), I decided to interview the case managers, the main service deliverers for the older Taiwanese, and who act as their personal advisors in the PESS. Lipsky’s (1980) theoretical perspective implies that the front-line workers’ roles might determine the practice and responsiveness of public policy at the micro level.

Indeed, based on Lipsky’s street-level bureaucracy, Wright’s ethnographic research on relationships between the users and front-line workers at a British Jobcentre Plus concluded that:

“Unemployment policy is not delivered uniformly or unilaterally because front-line staff are active in developing work habits that influence the outcomes of policy” (Wright, 2003: Abstract).

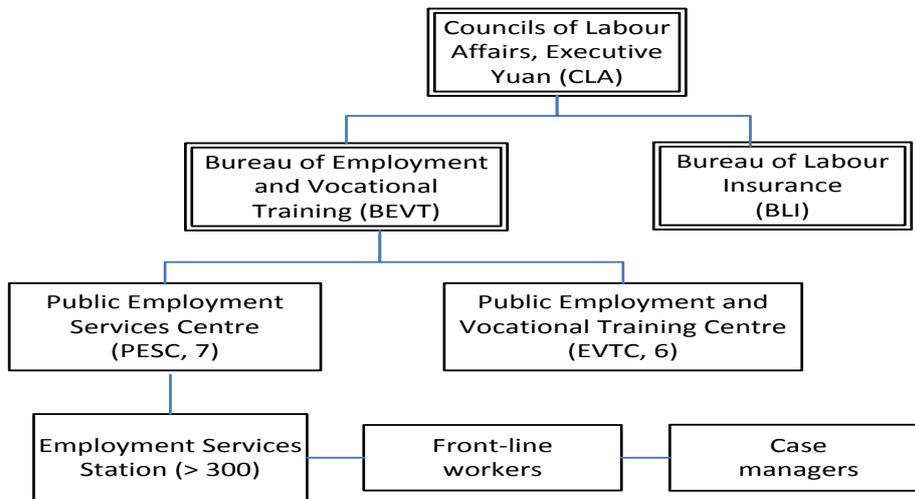
Similarly, a British researcher who interviewed thirteen frontline workers along with observations in six Jobcentre Plus, showed that front-line workers usually might “tailor their approach to the (perceived) orientation and.....service recipients have influence in the

interaction and receive individualised treatment from the organisation” (Rosenthal and Reccei, 2006:670).

In this sense, front-line workers can be seen as street-level gate-keepers who modify the interactions between the policy itself and service receivers; they are also experts to evidence how the different factors in various contexts shape older people’s employment barriers. Considering this thesis attempts to explore reasons for the lower employment rates among the older Taiwanese populations as a whole, case managers, who are the only service providers to older Taiwanese in the PESS, were chosen as research participants in this study.

In Taiwan, all employment services and provisions are established and regulated by the Employment Services Law, which was enacted in 1992 and amended in 2008, and the Employment Insurance Law, which was passed in 2002 and amended in 2007. The main principles of employment policies are governed by the Councils of Labour Affairs (CLA) and the main employment interventions are formulated by the BEVT. Both public and private sectors are included in employment services provision. Presently, there are seven Employment Services Centres (ESCs) and over 300 Employment Services Stations which are responsible for service delivery in the PESS (Figure 3.1). In this research, the definition of the PESS refers to all employment services which are delivered by the seven ESCs and the numerous Employment Services Stations.

Figure 3.1 Organisations of public employment institutions in Taiwan



In 2008, there were 7 Public Employment Service Centres, 316 Public Employment Service Stations, and nearly 240 case managers (BEVT, 2013). Disadvantaged job-seekers who want to apply for job-seeking allowance or those who are long-term unemployed and want to apply for relevant employment resources will be assigned to a case manager. It is obvious that each case manager had to carry a heavy work load, because their geographical responsible areas are usually quite large and they are required to follow up every client's job-seeking procedure (until their clients have worked in a job for more than three months). According to my working experiences in the PESS, one case manager often had to intensively serve 15-25 clients and had 40-60 clients to follow up. The Statistics of Employment Services represent all case managers' working performances in numbers. This data set mainly focuses on the results of job-matching, job-seekers' expected jobs and employers' registered job vacancies.

Case managers are entitled to assist all legally identified 'disadvantaged populations' (except for disabled workers, who have a package of tailored services) to return to work through

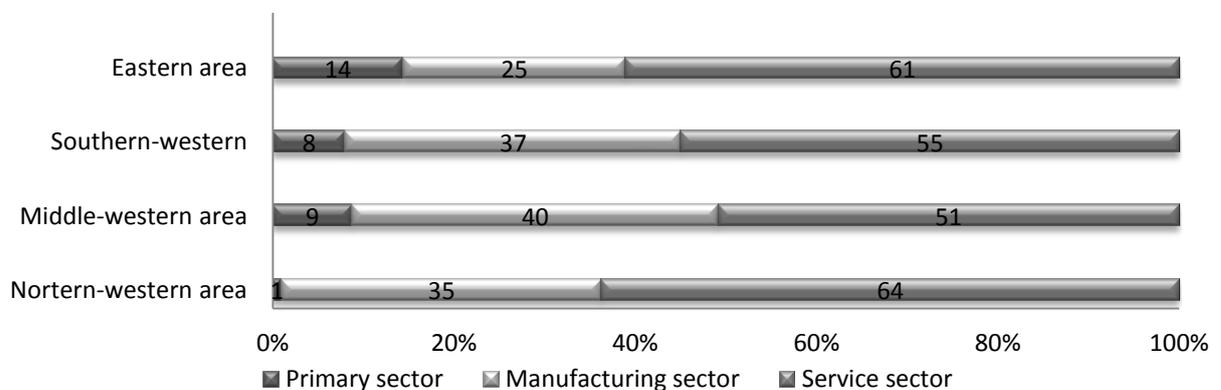
personal consultants, connecting them to relevant resources and job-matching. Practically speaking, every older client who enters the PESS will be assigned to a case manager who will then become his/her major advisor/helper during job-seeking periods. Under these circumstances, it is assumed that case managers in the PESS will have more understanding of the barriers facing older Taiwanese and it is important to pay attention to how they interpret these barriers and how socio-economic considerations affect their employment probability. However, by doing so, the findings might not fully represent perceptions from all older Taiwanese, the users in this case, nor the central government's, the policy makers in participants' minds.

3.8 Sampling strategy and characteristics of participants

In most qualitative studies, participants are selected based on purposive sampling strategies (Bryman, 2008). Mason (2002:121) suggests that sampling strategies in qualitative research has to accommodate two crucial concerns: "practical and resource-based issues" and "the important question of focus". Ritchie et al. (2003:79) point out that developing a set of tailored criteria which cover all crucial elements of research subjects is important and it is necessary to be aware of variants of selected samples among each element which could ensure "sufficient representation" to the wider population. Moreover, "maximum variation sampling" is used to obtain "the core experiences and central, shared dimensions of a setting or phenomenon" (Patton, 2002:235); deciding which characteristics of the participants should be seen as the most significant criteria is therefore the first target in terms of sampling.

Overall, it seems that having a well-developed sampling frame is helpful to ensure the breadth of the collected data. The following will detail the selected characteristics and the sampling frame. First, this research focuses on west Taiwan and excludes the east, which is less-industrialised and also has relatively low urbanisation (its economy heavily relies on tourism). Except for concerns over feasibility (as motioned in Table 3.1), and as Figure 3.2 shows, the percentage participating in the primary sector is significantly higher in the east, with correspondingly lower rates working in the manufacturing sector. Generally speaking, the majority of the big cities and working opportunities are in the west of Taiwan, so that nearly 90% of the PESS institutions are located in this region. Hence, older Taiwanese might encounter rather diverse employment barriers in the west compared to those in the eastern parts; in this thesis, however, I have decided to focus on the western area as the first step.

Figure 3.2 Percentages of working industries by regions in Taiwan 2008 (%)



Source: DGBAS (2009)

Secondly, the location of a case manager's working regions is grouped by urban, rural and manufacturing-intensive areas. It is believed that older people's employment barriers might be different according to locally dominant working sectors in each region. In Taiwan, the

ratio of working populations in the service to manufacturing sector was 6:4 in 2008 (DGBAS, 2009); the service sector has become the main sector in highly-urbanised areas (e.g. many cities in the north-west, see Figure 3.2). Moreover, manufacturing sectors were concentrated in several industrial zones (such as Taoyuan) and, as a consequence of the Taiwanese government promoting the development of high-tech manufacturing industries, some areas are dominated by these jobs (especially Hsinchu and Taichung); it is therefore necessary to clarify the specific factors that might limit the probability of employment for older Taiwanese who live in these manufacturing areas.

Thirdly, age and gender were identified as meaningful characteristics of the participants. As the above literature suggests, it is likely that Taiwanese social identity and family responsibilities (by either providing care or financial support) might differ by gender and age; it is believed that participants of a different age or gender will provide diverse views in terms of the impacts of the socio-economic contexts on the limitations of the employment of older people.

Finally, it is also identified that the work experience of case manager, particularly with respect to how long they have worked in the PESS, are important criteria; therefore, it is expected that both senior and junior case managers could be invited to be my participants. However, the challenges of having sufficient numbers of either male or senior case managers in my study are expected; according to my past working experiences in a Public Employment Centre, the majority of case managers are female and young (approximately aged 25-35, due to the qualification requirements and professional subjects for case

managers. For the same reason, the education and professional backgrounds did not become applicable characteristics in this sampling frame).

In addition, with respect to how many participants might be sufficient to answer the research questions, as pointed out, the most important consideration should be “whether your sample provides access to enough data, and with the right focus, to enable you to address your research questions” (Mason, 2002:134). Hence, before doing field work, my attitudes towards the number of participants was flexible, although I did bear in mind that the diversity of participant characteristics is a crucial element in this research.

The details of the characteristics of participants and sampling field notes are illustrated in Table 3.6 and 3.7. There are more female participants than male, and except for that, I am very glad and thankful that the sampling eventually went better than I had expected. The distributions of participants’ age, locations, and working experiences correspond with my plan (even though some participants appeared almost at the last minute, before I had to end my fieldwork). In fact, in order to maximise the diversity among my participants, I adopted multiple recruiting strategies; more discussion will be provided in the next section.

Table 3.6 Characteristics of participants and field notes of sampling

Sampling characteristics/ numbers (%)				Sampling field notes
Locations	Urban 10 (42%)	Rural 5 (20%)	Manufacturing 9 (38%)	A. <u>Urban areas</u> : Taipei, Kaohsiung, Tainan B. <u>Rural areas</u> : Chiayi, and Pingtung, Chunghua, Nantou, Yunlin and Miaoli C. <u>Manufacturing intensive area</u> : Taoyuan, Hsinchu and Taichung
Age	Aged below 31 8 (33%)	Aged 31-35 9 (37%)	Aged above 35 7(30%)	The age range of case managers was rather wide, but the majority were aged under 35. Fortunately, through snowball strategies, 3 case managers who were aged 40+ participated in the interviews (Mean=35; Min=27; Max=59)
Gender	Female 19 (79%)	Male 5 (21%)		Case managers were predominantly female; fortunately, through snowball strategies, 2 more male participants were introduced to me and agreed to participate in this research.
Working experiences	Less than 3 years 8 (33%)	Between 3-5 years 9 (38%)	More than 5 years 7 (29%)	In the beginning, it was quite hard to find senior case managers, but, this number increased from 4 to 7 after 3 aged 40+ case managers agreed to take part.

Table 3.7 Family names and locations of participants

No.	Name	Working location	No.	Name	Working location
1	Mrs Chiu (Pilot)	Taoyuan (Manufacturing intensive)	13	Ms. Lee	Chiayi (Rural)
2	Mr. Liu (Pilot)	Taoyuan (Manufacturing intensive)	14	Ms. Tsai	Chiayi (Rural)
3	Mrs. Lin	Kaohsiung (Urban)	15	Mrs. Ke	Taoyuan (Manufacturing intensive)
4	Mrs. Chen 1	Kaohsiung (Urban)	16	Ms. Wu	Miaoli (Rural)
5	Mrs. Zhuang	Kaohsiung (Urban)	17	Mrs. Chen 3	Hsinchu (Manufacturing intensive)
6	Mr. Bai	Kaohsiung (Urban)	18	Ms. Xie	Hsinchu (Manufacturing intensive)
7	Mrs. Kuo	Pingtung (Rural)	19	Mrs. Wu	Hsinchu (Manufacturing intensive)
8	Mr. Chen	Taichung (Manufacturing intensive)	20	Mrs. Ma	Taoyuan (Manufacturing intensive)
9	Mrs. Lai	Taichung (Manufacturing intensive)	21	Mrs. Huang	Taipei (Urban)
10	Mr. Lu	Chunghua (Rural)	22	Mrs. Wong	Taipei (Urban)
11	Mrs. Chen 2	Taichung (Urban)	23	Ms. Chen	Tainan (Urban)
12	Mrs. Lee	Taichung (Urban)	24	Mr. Wong	Tainan (Urban)

3.9 Recruitment of participants

Multiple strategies for recruiting participants were needed to achieve the researchers' intention to maximise the sample variation (Ritchie et al., 2003); in order to achieve this aim, I decided to combine snowball sampling and sampling through the PESSs in this study.

Snowball/ chain sampling

I recruited 12 participants through this manner (including two participants for the pilot interviews). I adopted this strategy because I still kept in close contact with some former colleagues within the PESS; a few were even case managers who had cooperated with social workers in my working programme on specific projects. A few weeks before my fieldwork, an email with a recruitment advertisement for interviewees (see APPENDIX 9.2) was sent to them, briefly explaining the topic, research aims and my desire to invite them or other case managers to be my interviewees. Afterwards, I received quite a lot of replies that showed an interest in taking part in my research.

However, while discussing the appropriate date for the interview, I found it was difficult to arrange suitable times for the interviewees, because I could only stay in Taiwan for three months, from December 2008 to February 2009. Unfortunately, this coincided with the busiest period from December to January in the PESS, as there are a lot of annual evaluation reports and meetings at this time). The situation was even worse that year because the ten day Lunar New Year holiday was much earlier, just after their deadline for the administrative reports to be submitted. Fortunately, by answering more questions about the background

and potential contribution of this research, seven interviews had already been scheduled. In the end, five more case managers were invited to become participants through snowballing.

Sampling through organisations

Before conducting my fieldwork, I posted a letter to the chief administrators at every PESC to introduce myself, explain my research aims, potential contribution and express my eagerness to interview case managers; in this letter, I also indicated that my sampling method partly relied on the snowball strategy and emphasised the importance of participation on an entirely voluntary base. Luckily, I have received positive responses from every PESC, either by post or email; moreover, they even gave me lists of case managers' official email addresses and promised me to post my advertisement sheet on their bulletin boards. Through sending emails to all the listed case managers' accounts and communicating with them, I eventually had another 12 participants to take part in my interviews.

After two pilot interviews, I found that inviting participants to share their experiences about serving one or two older clients might be an effective way to do this interview (see lessons from pilot studies). However, I found that ethical concerns had been raised along with this suggestion, in particular concerning the anonymity and confidentiality of their clients.

Therefore, I added a promise to follow ethical guidelines to the consent form (see APPENDIX 9.4) and decided to formally visit all chief administrators and explain face to face why and how I would like to conduct this research, inviting them to share two cases with me. Except for one who I met at an international conference and another two, who phoned me and stated that they agreed to this, I went to four face-to-face meetings with chief

administrators at the PESCs across western Taiwan and finally all agreed to do this. In the meantime, they were very kind to offer me the freedom to use their meeting room as an interview venue and allowed me to do the interviews during working hours.

3.10 Lessons from the pilot interviews

According to Silverman (1993:149), no matter whether reliability in qualitative researchers is an essential concern or not, to “pre-test an interview schedule” is a valuable action.

Considering that I had been away from the Taiwanese context for a few years, apart from making sure that my interview schedule was feasible, I also expected that I could be familiar with at least the case managers’ jargon, if there were any, throughout the pilot interviews. In order to achieve this, I invited two former colleagues who are senior case managers from different Employment Service Stations but in the same PESC.

As a preparation for the pilot interviews, I sent them my original interview guide in advance. One replied to me and indicated that it might be a little hard for some younger case managers to answer my questions in the social context section. After further discussion with the two pilot participants, I decided to employ a ‘vignette’ technique, which invites participants to respond to specific experiences as a way to sharpen their personal ideas towards certain topics (see Finch, 1987; Barter and Renold, 1999); according to Hazel (1995:2), “concrete examples of people and their behaviours on which participants can offer comment or opinion”.

Thus, I started my interviews by inviting participants to share two successful/unsuccessful older clients, because it might be easier for them to respond and then think about the

underlying social or economic contexts; also, it was beneficial for me to probe relevant questions about their working experiences. The two pilot interviews went well with the new interview guidelines (APPENDIX 9.5), and it was apparent that discussing the participants' working experiences with the two cases could be a good beginning for further deeper discussions; however, both pilot interviews were too long, two hours each, so that time control was raised as an issue. A number of meaningful lessons had been drawn from pilot interviews as followings:

Interview length

In the pilot study, participants spent too much time describing the older clients' background and work history. Therefore, it might be helpful to ask participants to note down some important demographic characteristics or information about their clients and then show me their notes beforehand.

Establish a trusting and effective working relationship

It would be helpful to highlight my past working experiences in the PESC and share my concerns about the (mis)understanding of jargon.

It would be helpful to explain why I chose case managers to be my participants (by Lipsky's "street-level bureaucracy" perspective); it might enable them to share deeper viewpoints within the interviews.

It was valuable for me to sign the consent form to highlight my promise to follow ethical research codes. This may also increase the participants' willingness to share their deeper thoughts.

Smooth the interview

It was found that summarising and clarifying the participants' descriptions at certain points was needed. In the pilot interviews, I tried not to interrupt the participants from talking as a way to offer them maximum space to answer my questions. However, it was too difficult to finish interviews within an hour and hard for them to answer all of the relevant questions.

Questions about comparisons between successful and unsuccessful older cases might inspire participants to sense what individual factors and barriers are crucial.

Additionally, I added more information about research purposes and the contributions of this research on my "information sheets" (APPENDIX 9.3) in order to raise the case managers' interest in this research. Furthermore, I put my promise to follow all ethical guidelines, mentioned on the information sheet, on the informed consent sheet (APPENDIX 9.4). Finally, I sent all this information via e-mails to participants and phoned them individually to ask if they have any questions about my research and interview guidelines before each interview.

3.11 Role of interviewers and interactive relationships

The role an interviewer plays in in-depth interviews is controversial and needs to be considered. On the one hand, as Pole and Lampard (2002:129) suggest, interviewers often behave like "a neutral tool of the research," having limited influences on interviewees and collected data. From this perspective, "neutrality and avoidance of self-discourse" is recognised as one of basic rationales for qualitative interviewers so that it might be improper for researchers to deeply involve themselves into their research contexts (Legard et al., 2003). On the other, it is noted that qualitative researchers are required to nest their

personal perceptions into the research contexts because the nature of interviews are more than daily conversations, and interviews are the instrument by which primary data is collected (Snape and Spencer, 2003).

Indeed, as Denscombe (2003:237) points out, “qualitative research tends to associate with researcher’s involvement.” The variety of researchers’ involvement varies by their background, beliefs and personal beliefs (Denscombe, 2003). Therefore, being sensible to the impact of my involvement in relation to my personal background and thoughts undoubtedly became an important consideration.

In this research, it is likely that I had dual roles from at least some of the participants’ perspectives; on the one hand, I am a researcher who conducts an independent and self-funded research within a limited timescale and expect the data collection could be effectively collected during the fieldwork. Moreover, I also need to be careful to have an open-mind and be neutral in order to sense the diverse opinions of my participants.

However, on the other hand, I am one of their former colleagues who shared a similar organisational culture with them; this indeed gave me plenty of privileges to establish a trusting working relationship in a short time and it also allowed me to keep an interactive communication with them after interviews.

In terms of building relationships as a researcher, a number of useful guidelines have been offered by Legard et al. (2003:156-7), such as: “expressing interest and attention”, “establishing that there are no right or wrong answers”, “being sensitive to tone of voice and body language”, “allowing the participants time to reply”, “handling extraneous information”. Following these, I therefore added more description about being open for any

answer on the information sheet, and, at the beginning of each pilot interview, I showed them statistical data about the employment conditions of older Taiwanese.

The reasons for showing them data on older workers mainly lie with the intention to raise their awareness of issues of barriers to employment for older Taiwanese. However, it might be a risk to distract their thoughts and descriptions in interviews. Thus, I only showed them the general findings derived from the Statistics of Employment Services (which are the statistical records of their service delivery) and, most importantly, I highlighted that they would have more insightful understanding of the statistical data.

Meanwhile, I highlighted my research identity and I did not say too much in the middle of the interviews to avoid too much self-discourse. Additionally, I detailed how the interview data will be used and accessed by me by storing it in either a locked drawer or in my own password-protected laptop.

However, if taking being one of their former colleagues into account, I also attempted to build up an interactive relationship with my participants within and after the interviews.

Maxwell (2005:10) outlines an interactive model in qualitative research and highlighted “the interactive nature of design decisions..... and the multiple connections among design components”. This insight provided me with the idea to retain a flexible attitude about the conduct and analysis of semi-structured interviews.

In practice, I adopted a number of my pilot interviewees’ suggestions to modify my interview plan. By doing so, I learned a number of helpful lessons about balancing the dual roles and smoothing the interview schedule for the main interviews (see 3.10 lessons from the pilot interviews).

Also, at the end of each main interview, I always asked if they wanted me to send them their individual transcriptions to allow them to check/add/justify their statements and promised that I would update them about my progress through e-mails. Some of the younger participants asked me to send their transcripts to them (a few also asked for the audio file as well); and two participants wanted to add after thoughts regarding the employment circumstances and barriers of older Taiwanese. Furthermore, after the initial analysis of all the transcripts, I sent them my initial thoughts about potential themes as the first part of the analysis; and, fortunately, I gained some more information from eight participants' emails who offered their perceptions about the impact of age and gender stereotypes, marital status and constraints by the economic downturn.

Reflecting on one of my dual roles, first, as a researcher, I believe that inviting interviewees to become involved in the analysing process could double check the validity of the research findings. Meanwhile, it is likely that being open to additional information from the interviewees is beneficial for the depth of the qualitative data.

Second, giving the promise to share my working findings to my participants is not only an ethical consideration, but also, as a formal colleague or friend, presents my strong gratitude for their kindness in helping me to complete my research. In each email, I always dedicated my findings to them and they often did not forget to encourage me to carry on my research. Unlike the action research method, which also emphasises the circular process of action, reflection and improvement (Costello, 2003; McIntosh, 2010), I did not intend to use my research working findings to change, or improve, my participants' front-line services. Rather,

I saw this as a way to build an interactive relationship to help answer my research questions and position my dual roles before them.

3.12 Data analysis

In terms of the methods used to analyse the qualitative data, Mason (2002:150-1) suggested that developing “a uniform set of indexing categories” by coding could organise data in a systematic way; similarly, the identification of “key themes, concepts or categories” is frequently employed as an approach to qualitative resources (Spencer et al., 2003:202). Hence, unpacking the nature of the interview data with a group of key concepts in relation to the overarching research question is likely to be the main concern.

With respect to ways of starting the data analysis, some researchers are very flexible. For example, research based on a grounded theory often employs open coding as its first step to analyse data (Strauss and Corbin, 1998; Yates, 2004; Urquhart, 2013). As Strauss and Corbin (1998:102) point out, the advantages of open coding is “to uncover, name and develop concepts, we must open the texts and expose the thoughts, ideas and meanings contain therein”. However, it has also been criticized as unable to “acknowledge implicit theories which guide work at early stage” (Silverman, 2010:236).

By contrast, as May (2001:139) points out, “the aims of their research and theoretical interests” is often a major concern for data analysis. Some use a thematic analysis strategy and thematic network (Attride-Stirling, 2001), or use a cross-sectional code (Mason, 2002; Spencer et al., 2003). As Spencer, et al (2003:203) highlight, this analytical approach can “aid locating conceptual, analytical categories in the data”.

Practically speaking, the analytical themes or codes often come from the existing references, if accessible and reliable. For instance, in Verkerstaff, et al (2008:19), the main themes were generated from references, including “factors affecting continued working, retirement and knowledge about, and aspirations for later working life”. In Hsu (2007:92), six themes deriving from the global definitions of successful/active ageing were used to investigate the degree of successful and active ageing among older Taiwanese participants, including the “activities of daily living (ADL), instrumental activities of daily living (ADL), cognitive function, depression, social support and productive activities”.

This research concerned the reasons for low labour participation rates among older Taiwanese. Two theoretical perceptions were adopted as a theoretical framework, for instance, human capital, ability to work, employability, social capital and ageing culture (see 2.2). Additionally, the literature suggested that ‘individual factors’, ‘employers, policy and relevant economic factors’ and ‘socio-cultural factors’ also have significant impacts (see 2.3). Therefore, it is likely that using thematic analysis would be a practicable approach to analyse qualitative data, rather than using open coding strategy.

In this case, ‘individual factors’, ‘employers, policy and relevant economic factors’ and ‘socio-cultural factors’ were groups of factors that could be considered to be tree nodes. Within each group of factors, signposts I identified manually became free nodes and were attached to different tree nodes; for instance, the skills issue as an individual factor; the economic downturn as part of the employers, policy and relevant economic factors; and family attitudes as a socio-cultural factor.

Furthermore, this research aimed to identify what was widespread or common within the interview data (Mason, 2002). However, as Silverman (2010) warns, thematic analysis might cause a lack of sensitivity towards uncategorised events. Specific points which repeatedly appeared in data but do not belong to any categorised theme were valued and enclosed as well. The similarity of employment barriers of each identified type of older Taiwanese worker is the main target. In addition, reflecting the overarching question, 'to work or not to work?', both similarity and differences in employment barriers that occur between various types of older Taiwanese worker are a crucial focus.

Data analysis could be started while doing fieldwork; as Silverman (1993) suggests, the systematic writing of field notes increases the reliability of the research. After getting the participants' agreements, all interviews were recorded and I always took field notes to record my observations, thoughts, and crucial points generated from the participants' descriptions. Moreover, I liked to listen to the recording right after the interview again and again (usually as I travelled the long distance from one city to another for next interview) as a means of familiarising myself with the collected data (May, 2003); meanwhile, I often revisited research questions to check if any important questions were missed or if there were any similarities between participants' opinions that were emerging to answer a research question.

After transcribing all recordings into Microsoft Word documents, I combined manual signposting and Nvivo software at different stages. In the beginning, I started to place signposts manually; the idea of signposts is mainly derived from the literature review and my field notes. It was time consuming, but it offered me an opportunity to be involved intensely

with these data and recalled how my participants used different tones to describe similar issues. Using computer software is an effective way to categorise indexing (Mason, 2002) and map diagrams; so the latter analysis was carried out using 'Nivivo' software.

3.13 Ethical considerations and research limitations

This research is self-funded, individual, research and it was independently carried out by a single researcher so that there would not be any controversial issues relating to funding organisations or other team members; this is seen as an advantage in terms of ethical considerations (Bryman, 2008). Before conducting the fieldwork, I submitted my ethical review to the committee at the Institution of Applied Social Studies, University of Birmingham in October of 2008. Most of the significant ethical considerations were approved, including: provision of sufficient information and the informed consent form, consideration of anonymity, statement about the right of participants to withdraw from the study, consideration of possible detrimental effects of the study on participants and also the questions.

The committee raised two potential issues about my research design; first of all, it highlighted that choosing their working places as the interview venue might potentially cause the participants to be wary of criticising their organisations because their managers would know who were taking part in my research. Second, the participants (who speak in Mandarin) might not be able to directly communicate with my supervisors due to language issues which would limit their possibility of making any comments or complaints about my research. Responding to these issues, I added more statements to the advertisement and information sheets to express that they were welcome to choose another public venue for

the interview. I also clearly described my supervisors' contact details along with a promise to pay for any translations of appropriate emails. In practice, only one interview was conducted outside the office due to being unable to arrange a date during the working day; all other participants chose to do their interviews in their offices' consultant rooms – they all said that they were not worried about being identified because they were delighted that their voices could be heard through participating in my research.

In terms of research limitations, despite the above mentioned concerns of research scope, selecting case managers as participants, and using secondary data, language translation might be another limitation. This thesis is written in English but the primary data is collected and analysed in Mandarin. This decision had been made before data analysis because it is very difficult to translate all Mandarin expressions fully into English. For instance, in Mandarin, a single term, *Jia*, is mainly used to represent various familial notions depending on the context; it could be used as a verb, noun and also as an adjective, such as: family, family member, household, home, house, domesticated, domestic, and even as having close friendships as family members or a school of thought (in English terms). Therefore, it is not possible to guarantee that all of the participants' expressions and underlying thoughts could be fully preserved after translation into another language.

However, given that the most important part of a qualitative research is to explore meanings in a particular context (Silverman, 1993), it seems that the quality of a qualitative study should depend on how research findings shed light on research subjects/contexts. As results of all transcripts were in Mandarin and analysed in Mandarin, the only circumstance for translation is when some of the interviewee statements were directly quoted; but this did

not affect the main answers to the research questions in this thesis since the main analysis was done by Mandarin itself. Hence, it is likely that the research findings will still be original and be able to provide some insights into the limitations on the probability of the employment of older Taiwanese. Fortunately, through my supervisors' constructive advice through regular supervision, minimising the limitations with regard to language translations has been an ongoing process. I also asked my colleagues' to read through my work and sometimes I paid for proofreading to double check.

3.14 Summary

This chapter explains why and how the mix-method approach has been employed in this thesis. It also gave an account of how the quantitative and qualitative studies had been conducted and analysed. Moreover, discussion with regard to the ethical issues and research limitations has been presented as well.

The following three chapters describe the findings in this thesis; the first speaks to the first theme, 'factors and types of employment circumstances among older Taiwanese'; the second to 'employment barriers among different types of older Taiwanese'; and the final findings chapter to 'employment barriers to older Taiwanese workers and meanings in socio-economic contexts'.

4 FACTORS AND TYPES OF EMPLOYMENT CIRCUMSTANCES AMONG OLDER TAIWANESE

4.1 Introduction

This chapter aims to explore the first theme which relates to the factors and types of employment circumstances among older Taiwanese, and two subsequent questions:

- 1) What individual factors have impacted on the employment circumstances of older Taiwanese workers?
- 2) What are the characteristics of older workers who share similar problematic employment circumstances?

These two research questions will be addressed by re-analysing two sets of secondary data and an examination of official literature.

The first research question will be answered by re-analysing an official dataset and an official report. First, the Statistics of Employment Services, which is regularly published online by the BEVT, will be used. Comparisons between supply and demand sides (within the PESS service delivery) in relation to the employment circumstances of older Taiwanese will be presented using diagrams and tables.

As the above literature review shows, older people's employment circumstances are determined by various individual factors. However, the dataset specifically focuses on five factors: gender, age, education, region and occupation. Thus, the following analysis will be limited to and developed around these factors. Second, how these factors link with, and influence, older people's different employment conditions (employed, unemployed and

economically inactive) will be provided by drawing lessons from an official report of a national survey, *Living Conditions of Middle-aged and Older People in Taiwan* (DGBAS, 2008). Similarly, the discussions here will focus on a number of individual factors due to the limited nature of the secondary dataset.

Finally, relationships between the factors influencing older people's employment circumstances will be revealed by using SPSS to re-analyse *The Annual Manpower Survey*. This dataset contains a wider set of variables, thus allowing a greater understanding of other important individual factors, such as marital status, and interactions between the variables. The second research question is addressed in this chapter, too. At the end of this chapter, two groups of older Taiwanese who share similar problematic employment circumstances will be identified by comparing results of the above analysis.

DEMAND AND SUPPLY FACTORS AMONG OLDER TAIWANESE WITHIN THE PESS

According to the Employment Services Act and Employment Insurance Act, except for employed workers who are seeking new jobs, those made involuntarily unemployed and who want to apply Job-Seekers' Allowance need to register at one of the local PESS. Meanwhile, apart from employers who require services from the PESS themselves, those employers who aim to recruit low-skilled foreign workers are requested to release a certain percentage of job vacancies for native workers to the PESS; by doing so, they can recruit more foreign workers for their enterprises.

A national statistical report on the distribution of registered job vacancies and job-seekers is absent. However, according to a local report published by one Public Employment Service Centre in 2011, the average expected monthly wage among registered job-seekers was NT\$24,776 (nearly £500; £100 higher than the annual minimum wage). By contrast, the average giving monthly wage among registered job vacancies was NT\$30,891 (nearly £618; £218 higher than the annual minimum wage) (Taoyuan-Hsinchu-Miaoli Employment Service Centre, 2011).

Moreover, among job-seekers at this centre, this report showed that the majority were young job-seekers. The average age was 25-29 years-old; educated level was in-between low and middle levels; or looking for low-skilled jobs (47%). With respect to successful rates of job-seeking, younger job-seekers were more likely to return to work. This showed that successful job-seeking rates among the aged 25-29 job-seekers were the highest; however, it still remained at a low level (only 29%; followed by those aged 20-24, 21%; and those aged 30-34, 14%).

The analysis in this section aims at providing important information regarding available working opportunities (demand side), job-seekers (supply side) and filling of job vacancies and job-seeking circumstances in practice. This is based on secondary data from the Statistics of Employment Services, which is produced from service delivery within the PESS. The following analysis mainly focuses on exploring the impacts of five factors on older Taiwanese job-seekers' chances of gaining employment within the PESS context.

In addition, as mentioned in chapter 3 above, there are a number of intensive manufacturing areas in Taiwan (mainly in Taoyuan, Hsinchu and Taichung industrial zones); thus, these

three areas were therefore grouped as manufacturing areas although the service sector still dominates in these areas.

4.2 Ratios between supply and demand sides within the PESS

The ratio between the supply and demand sides within the PESS is derived as follows

$$\text{Number of valid registered job vacancies} / \text{Number of valid registered job-seekers} \times 100$$

This ratio is often used as a tool to compare the provisions of available working opportunities and the amount of job-seeking labour force at the front-line level. As Figure 4.1 illustrates, the average of this ratio was 0.87, which implies that there were more job-seekers than job vacancies within the PESS.

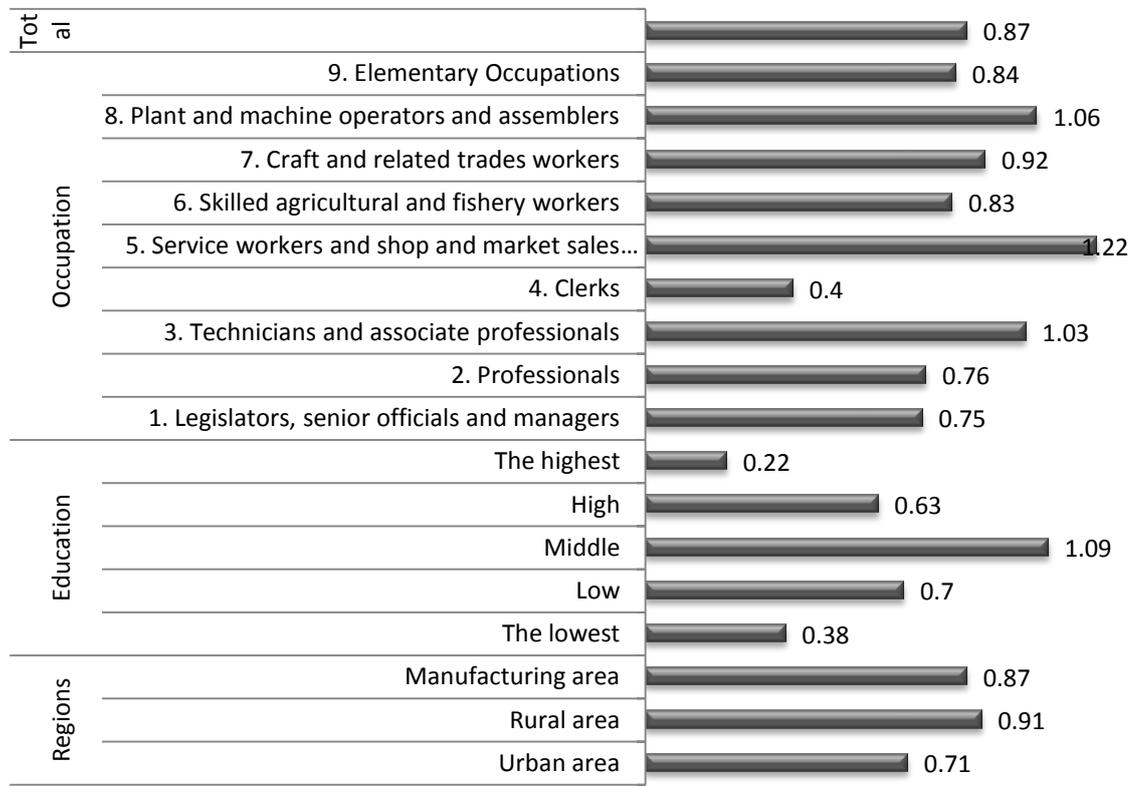
In terms of occupations, it appears that only three types of job, including: *Service workers and shop and market sales workers*, *Technicians and associate professionals* and *Plant and machine operators and assemblers* were slightly higher than the supply of workers, the least being *Clerks*, 0.4. It is understandable that there were more job vacancies for service or skilled workers, such as *Technicians and associate professionals*, since the literature suggests that the service sector has become dominant and the number of jobs in the manufacturing sector has significantly decreased during the last decade in Taiwan; but, surprisingly, job vacancies for low-skilled manufacturing jobs, such as *Plant and machine operators and assemblers*, were still in excess of the numbers who were seeking these type of jobs.

With respect to qualifications, which are divided into five levels in this data, the results across of the spectrum differed considerably between the two ends and the middle. In general, job-seekers who had the highest and lowest education qualifications had the least

likelihood of gaining working opportunities in the PESS; by contrast, there were more vacancies for job-seekers who had middle education qualifications. In the light of regional diversity, the number of job vacancies was apparently lower than the number of job-seekers in urban areas; thereby implying that job-seeking in this area was more competitive compared with the other two regions.

From the above, it seems that job-seekers within the PESS were more likely to find jobs as service, skilled or low-skilled manufacturing workers; those who had middle education qualification or lived in non-urban areas might also have more work opportunities. However, apart from these circumstances, it is apparent that there were generally more job-seekers than job vacancies. In particular, those who wanted to work as clerks, had the highest or lowest educational qualifications, or were living in urban areas. Such individuals might therefore encounter more difficulties in the labour market.

Figure 4.1 Ratios between demand and supply sides in 2008



4.3 Ratio of job vacancy utilisation

The above analysis has shown that there were often more job-seekers than job vacancies (by different occupation, education and region). In this section, the types of job vacancies in the PESS that were less likely to be filled will be discussed as a lens through which to explore the types of jobs job-seekers from the PESS were less interested in or might have more opportunities of obtaining (if they could fit in with employers' demands or wish to apply for them). The ratio of the utilisation of job vacancies is

$$\text{Ratio} = \frac{\text{Number of successful job-matching vacancies}}{\text{Number of valid registered job vacancies}}$$

By examining the utilisation of valid registered job vacancies, it is recognised that a greater supply of labour might not guarantee every type of job vacancy can be filled. As Figure 4.2 shows, there were numerous job vacancies available in 2008; the average ratio of utilisation of valid registered job vacancies was only 58%, which means that two-fifths of job vacancies remained unfilled. Looking at the types of jobs that were less likely to be occupied, it appeared that employers who were looking for managerial, professional or high skilled jobs were less likely to be successful; for instance, only one-third of job vacancies for *Legislators, senior officials and managers* had been taken and three-fifths of *Professional* job vacancies were still available. Interestingly, although job vacancies for clerks had the lowest ratio between demand and supply (greater numbers of jobseekers than job vacancies), only 57% of the clerk's jobs had been occupied. Among three occupations which had slightly more job vacancies than numbers of job-seekers, only vacancies for *Plant and machine operators and assemblers* appeared to have a relatively high percentage occupied at 66%; others remained at a remarkably low level, 58%, for *Service workers and shop and market sales workers*, and 50% for *Technicians and associate professionals*.

Moreover, among five groups by education level, job vacancies which favoured higher qualifications were far less likely to be occupied; for instance, 38% and 45% for the highest and highly qualified groups, compared with more than three-fifths for the low and lowest ones. This result seems to correspond with a lower utilization of managerial or professional jobs and also implies that employers who looked for low-skilled or low-educated workers were more likely to be successful through the PESS' assistance.

Regarding the expressed reasons which limited the utilized ratios of job vacancies, as Table 4.1 shows, it seems that the impact of job-seekers' expectations and employers'

requirements towards an individual's circumstances were equivalent. 54% of job vacancies remained unoccupied because of job-seekers' expectations of later jobs. For instance, concern for the working environment and other aspects, 23%; working time, 15%; personal interest, 6%; payment and benefits, 5%; and working regions, 5%. Furthermore, 46% of job vacancies were not utilised due to employer's concerns about the candidate's personal circumstances; the majority related to working skills, 30%; physical and health issues, 9% educational qualifications, 1%; and other concerns, 6%.

Table 4.1 Percentages of reasons of un-utilised job vacancies within the PESS in 2008 (%)

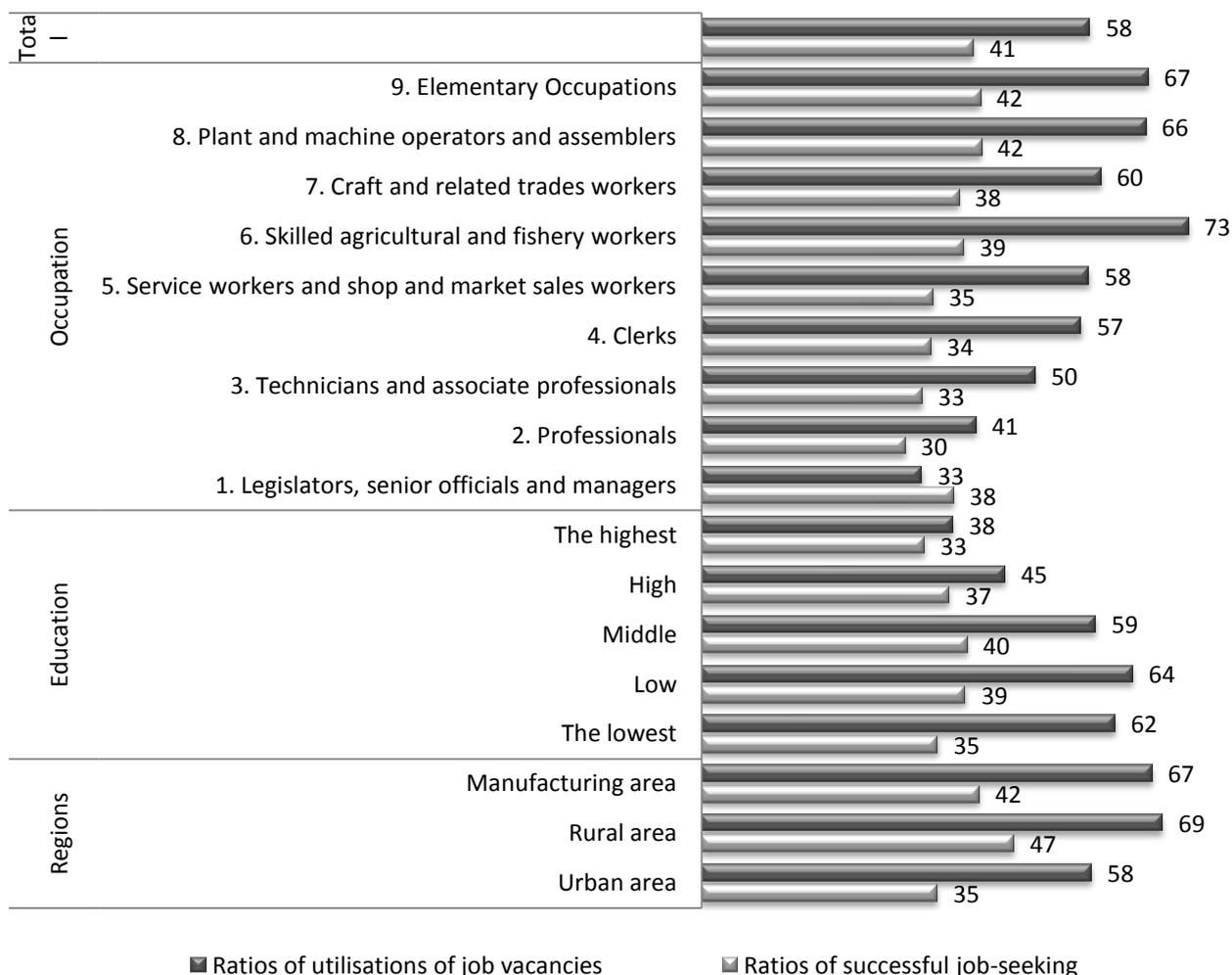
Reasons	Sub-reasons	Total	Urban area	Rural area	Manufacturing area
Didn't match with Job-seekers' expectations	Payment and benefits	5%	4%	5%	6%
	Working regions	5%	4%	6%	5%
	Working time	15%	12%	20%	15%
	Working environment and other concerns	23%	38%	16%	14%
	Personal interests	6%	4%	5%	8%
Didn't match with employers' requirements toward individuals' circumstances	Working skills	30%	25%	31%	32%
	Educational issues	1%	1%	1%	2%
	Physical and health issues	9%	6%	12%	11%
	Others	6%	7%	4%	7%
Total	%	100%	100%	100%	100%
	% by regions	100% (N=8,280)	41% (N=3,355)	32% (n=2,677)	27% (N=2,248)

Considering the distribution of un-filled job vacancies by region, the majority were located in urban areas, 41% compared with 32% in rural areas, and 27% in manufacturing areas. Some regional differences in relation to reasons for low un-utilized job vacancy ratios have been found. First, job vacancies in urban areas were more likely to remain available by

consideration of the working environment and other aspects, 38%, compared with 16% and 14% in rural and manufacturing regions respectively. By contrast, it appeared that working skills are more important in determining whether or not a job is taken in these two regions; the percentage of concern about physical and health issues was double in the rural and manufacturing regions when compared with the rural region. In addition, concerns about working time were more important in the rural region when compared with the others.

In conclusion, it was found that job vacancies requiring low-skilled or low-educated workers were more likely to be occupied within the PESS, but the low utilised ratios of job vacancies imply that the reasons why those job-seekers who remained unemployed might not be simply associated with the diminishing numbers of jobs, particularly in the manufacturing sector. In spite of these mentioned reasons, some controversial results between demand/supply ratios and utilized ratios of job vacancies seem to suggest that there might be more fundamental reasons which underlie either an employer's willingness to recruit job-seekers, or a job-seeker's interest in applying for these jobs; thus, it is important to discover what produced these barriers to job vacancies for older job-seekers.

Figure 4.2 Ratios of utilisation of job vacancies and successful job-seeking in 2008 (%)



4.4 Ratios of successful job-seeking within the PESS

In this section, the types of job-seekers in the PESS that were less likely to return to work will be discussed in order to identify the relationships between the probability of job-seekers gaining employment, by occupation, education and region. The ratio of successful job-seeking is

$$\text{Ratio of successful job-seeking} = \frac{\text{Number of valid, successful job-seeking clients}}{\text{Number of valid registered job seekers}}$$

As figure 4.2 shows, the average of this ratio was even lower; two out of five job-seekers could find their working opportunities within the PESS. With diversity among occupations, except for those who were looking for two types of low-skilled jobs, *Plant and machine operators and assemblers* and *Elementary occupations*, most job-seekers appeared to have had relatively low success rates. Moreover, it is noted that even though in some occupations where job vacancies were slightly higher than the number of job-seekers, success rates were not significantly higher; for instance, 35% and 33% for *Service workers and shop and market sales workers* and *Technicians and associate professionals*, respectively. Thus, this result seems to reinforce a similar assumption, that is, barriers for job-seekers to gain working opportunities might not simply depend on how many working opportunities are available for them at the micro level.

By contrast, it seems that the impact of education and geography were likely to be consistent in these various aspects; it is found that job-seekers who had middle educational qualifications had a slightly higher probability of returning to work, compared with those who had the highest or lowest levels; also, job-seekers who lived in urban areas were less likely to gain working opportunities. In these cases, education and geography are influential in determining accessibility to work opportunities.

With regard to the reasons which limited a job-seeker's probability of returning to work, it seems that their expectation of subsequent employment played an important role, 74%, followed by 26% who were constrained by employers' requirements. As Table 4.2 shows, in general, one-third of job-seekers were limited by personal concerns about their working environment and nearly one-fifth chose not to become employed due to considerations about working time. As for the impact of employer's requirements towards job-seekers, skill

issues were likely to be the dominant constraint, nearly one-fifth, but also a number of job-seekers were constrained by physical and health issues.

Regarding the distribution of unsuccessful cases within regions, nearly half lived in urban areas, whereas one-quarter lived in rural or manufacturing areas. Similarly with the above analysis of the reasons for un-filled job vacancies, concerns about the working environment appeared more influential on an urban job-seeker's employment probability of employment, 41%; by contrast, there were more job-seekers in rural or manufacturing areas who were limited by skills issues. Moreover, concerns about working time and physical and health issues were likely to produce a negative influence on a job-seeker's employment probability in rural areas, whereas personal interest was more influential for job-seekers in manufacturing areas.

Hence, a number of similarities regarding the reasons which resulted in low utilisation of job vacancies or low success rates of job-seeking within the PESS have been identified; it seems that concerns about the working environment, working time and personal interests might be crucial limitations in terms of a job-seeker's expectations of later jobs; skills issues and physical and health issues often appeared as employment barriers with respect to employer requirements. However, it remains unclear the extent to which working environment, working time, personal interests, skill or physical and health issues limit a job-seeker's employment probability, so more information from qualitative interviews will be important. In the following, more details of the supply side of the labour force are given.

Table 4.2 Percentages of reasons of unsuccessful job-seeking within the PESS in 2008 (%)

Reasons	Sub-reasons	Total	Urban areas	Rural areas	Manufacturing areas
Job-seekers' expectation	Payment and benefits	7%	7%	6%	6%
	Working regions	4%	4%	3%	5%
	Working time	17%	16%	20%	18%
	Working environment	33%	41%	25%	29%
	Personal interests	12%	13%	6%	17%
Employers' requirements toward individuals' circumstances	Skilled issues	17%	12%	25%	16%
	Educational issues	1%	1%	1%	1%
	Physical/ health issues	8%	6%	14%	6%
	Others	0%	0%	1%	1%
Total	%	100%	100%	100%	100%
	% by regions	100% (N=16,214)	48% (n=7,804)	26% (n=4,197)	26% (n=4,213)

4.5 Probability of gaining work by age

As mentioned above, age and gender cannot legally be seen as a recruiting requirement under any circumstance in Taiwan, so the distribution of the utilisation of job vacancies by age and gender is absent from the official published data. However, based on the successful job-seeking ratio, it is observed that there was an obvious decreasing tendency from the younger to the older age groups, which means that the probability of gaining work noticeably declines for older job-seekers. By grouping job-seekers into 5 year cohorts, as Table 4.3 shows, statistics show that the total proportion started to decrease after the age of 35 and had dropped by 14% from those aged 35-39 to the over 65s. Moreover, the decrease became more obvious, 5%, for the over 65s. Practically speaking, only one out of four job-seekers aged 65 and over could return to work successfully through the PESS.

Compared with the average ratios of successful job-seeking by occupation, education and region (see Figure 4.2), with the exception of those at the lower of the older job-seekers, for instance, those aged 45-49, it appeared that for the majority of older job-seeker's, the probability of returning to work was consistently and considerably lower than the average. Thus, age played an important role in determining a job-seeker's employment; more precisely, the possibility of employment for older workers was limited by their age.

In terms of the impact of gender, as Table 4.3 shows, the total proportion was slightly higher for male job-seekers, so it seemed that male job-seekers had a higher probability of returning to work within the PESS. However, this superior situation only appeared amongst the younger groups. By contrast those females aged 45+ generally had a slightly higher success rates when job-seeking through the PESS; in particular, amongst the oldest job-seekers, those aged 65+, the female ratio was 5% higher than the male one.

Table 4.3 Ratios of successful job-seeking by age, gender and region in 2008 (%)

Gender/Region		Age	Total	Aged 30-44	Aged 45-54	Aged 55-59	Aged 60-64	Aged 65+
Total			38	39	34	31	30	25
Gender	Male		39	39	34	30	30	23
	Female		37	38	35	31	30	29
Region	Urban areas		35	42	34	28	27	22
	Rural areas		47	47	38	35	37	32
	Manufacturing areas		42	41	34	30	26	21

In addition, with respect to the impact of age and region upon the probability of employment for job-seekers (see Table 4.3), most of the job-seekers aged 45 and over were less likely to return to work successfully compared to those aged 30-44. Moreover, it is apparent that this rate declines for those in urban and manufacturing areas aged 45-54 to 65

and over, which implies that older workers might find it even harder to obtain employment in these areas. By contrast, this rate seems to remain more stable in rural areas. The rate declined by 12-13% in urban and manufacturing areas (for those groups aged 45-54 and aged 65 and over) compared with only 6% in rural areas.

Therefore, two conclusions with regard to the interaction between age, gender and region can be made. In terms of the probability of successful job-seeking at within the PESS context, first, older males were less likely to return to work than females, presumably because older males might encounter certain specific barriers to employment. Second, it is likely that older job-seekers might have more difficulties to obtain employment in urban and manufacturing areas rather than in rural areas. Finally, comparing successful job-seeking rates within older age groups, it seems that older workers who were aged 55 and above (defined as old-older workers in the following), appeared to have an even lower possibility to return to work if compared with those aged 45 to 54 (defined as young-older workers).

4.6 In summary: factors relating to the possibility of employment of older

Taiwanese within the PESS

To sum up, it seems that the degree of possibility of successful job-seeking differs by occupation, education, region and age. As Table 4.4 summarises, in terms of the impact of occupation, it appears that the majority of opportunities through the PESS were often for low-skilled and manufacturing employment, although there were more vacancies in the service sector or for skilled jobs (demand) than job-seekers who were looking for this type of employment (supply).

Table 4.4 Employment probabilities by factors through the PESS

Factors	Probability	Demand/supply ratios	Ratios of utilisation of job vacancies	Ratios of successful job-seeking
Occupation	Low	Clerks	Managerial and professional occupations	Professional and skilled occupations
	High	Service, skilled or low-skilled manufacturing occupations	Low-skilled occupations	Low-skilled occupations
Education	Low	The highest and lowest educated	High-educated	The highest and lowest educated
	High	Middle educated	Low-educated	Middle educated
Region	Low	Urban areas	Urban areas	Urban areas
	High	Rural areas	Rural and manufacturing areas	Rural and manufacturing areas
Age (45+)	Low	(Rate of successful job-seeking) Old-older (aged 55+) job-seekers, living in urban and manufacturing areas, older males		
	High	(Rate of successful job-seeking) Young-older (aged 45-54) job-seekers, living in rural areas, older females		

As for the influence of education, job-seekers who had middle education qualifications had a higher possibility to returning to work; by contrast, those with lower or higher qualifications appeared to have a lower probability of gaining work; but job vacancies for low educated workers were more easily filled. Moreover, those living in urban areas had the least probability of obtaining employment compared with rural and manufacturing areas. With respect to those job-seekers aged 45 and over, those living in urban and manufacturing areas, or older males more generally, were less likely to return to work through the PESS. How these individual factors influence older people's employment conditions will be discussed next, using another official survey.

FACTORS INFLUENCING EMPLOYMENT CONDITIONS FOR OLDER TAIWANESE

In this section, the primary aim is to gain an initial understanding of how individual factors contribute to shape the employment conditions of older Taiwanese (employed, unemployed and economic inactive). The definitions of each economic condition are first, populations who were working full-time (35 or more hours per week) or part-time (less than 35 hours) were defined as being employed; second, according to the Taiwanese Employment Act, those who did not have any paid employment but were actively seeking employment were defined as being unemployed. Thirdly, populations who were students, were ill, aged over 65 or disabled, or running a household could declare themselves as being economic inactive (CLA, 2010)

The government report, *Living Conditions of Middle-aged and Older People in Taiwan* (DGBAS, 2008), was used to examine these issues. This nationwide survey is the only investigation which specifically targets mapping older people's living arrangements in Taiwan. This quantitative survey adopted a random sampling strategy and its participants were older people themselves, so it can be seen as a rich resource concerned with older people's employment conditions.

According to this report, the majority aged 45 and over considered themselves to be economically inactive, 54%; 44% considered themselves employed; and only 1% saw themselves as unemployed. It is noticeable that the proportion of older people who perceived themselves as unemployed was much lower than the official published unemployment rates; however, this difference might result partly from the official unemployment rate only covering those aged between 45 and 64. Therefore, it might be

reasonable to conclude that this to be a reason why the rates of those economically inactive increase considerably when taking into account those aged above 65.

In the following, the relationships between older peoples' individual factors and three employment conditions will be discussed separately.

4.7 Employed older workers

57% of older employed workers were in the service sectors; 32% in manufacturing; and 11% in the primary sector. This implies that the service sector has become dominant in the Taiwanese labour market. Moreover, the proportion of older Taiwanese who worked in full-time jobs was fairly high, at 94%; but older females who were part-time workers were slightly higher than older males, at 7% and 5% respectively. In general, older workers with low education qualifications, aged 60-64, manufacturing workers or those who worked as machine operators, were more likely to work part-time.

Moreover, it seems that the majority still preferred to work full-time; 19% of older workers chose to work part-time voluntarily, and 64% of male and 47% of female part-time workers said that they had difficulties in gaining full-time employment. However, as was demonstrated above, since physical/ health issues were found to be a barrier that decreases either a job-seeker's opportunities for work or the chances of applying to an employer's vacancy, it is presumably the prevalence of full-time working that results in older people having further difficulties in retaining work, because their physical strength might be declining along with growing old.

The data shows that 99% of older employed wanted to remain in work, but high percentages of employed older workers felt insecure with respect to keeping their jobs. 32% worried about becoming unemployed; over four fifths assumed that they would lose their jobs through redundancy. With respect to who were more likely to be anxious about losing their job, overall the data showed that those aged 45-49, with low levels of education, manufacturing workers or machine operators appeared to have the highest levels of anxiety.

4.8 Unemployed older workers

Second, with respect to unemployed older workers, it seems that the majority were looking for low skilled or manufacturing jobs (61%). Except for the highly educated (62% were looking for jobs as *Technicians and associate professionals*), the majority were keen on working in manufacturing. For example, 79% of those with low education expected to work as *Plant and machine operators and assemblers*; and males (64%), females (51%), and the middle educated (48%) unemployed older populations had similar levels of expectation. This shows that the older unemployed population preferred to search for manufacturing jobs, especially males and the low educated, even though the service sector is dominant in Taiwan.

It appears that self-confidence is an important issue that prevents older unemployed Taiwanese from returning to work. Perceptions of hopelessness about returning to work seem to be a widespread concern, with only 15 % of the older unemployed having the confidence of regaining employment. 55% believe that age might be the most important barrier to work, 22% are worried about the lack of suitable working opportunities, 4 % about skills issues and 4 % about physical constraints. These results correspond with the reasons expressed about the low utilisation of job vacancies and low success rates of job-seeking

within the PESS. Additionally, gender, age and education had significant impacts on shaping older job-seekers' self-confidence; briefly speaking, female, old-older (aged 55+) or low educated job-seekers usually had rather low self-belief about themselves.

4.9 Economically inactive older populations

As for economically inactive older people, 86% had participated in paid work beforehand (22% of females had never worked outside their homes, less than 2% of the males). Females were more likely to be economically inactive at an early age whereas the working life of males might be longer than females. The statistics show that the average age of being economically inactive was 48 for females and 57 for males. Taking the Taiwanese pensionable age (65) into account, this finding indicates that most older Taiwanese exit from work earlier, particularly women.

Furthermore, the motive for working for these economically inactive populations was rather different by age and marital status; but it showed that gender did not appear to have a very significant impact. For instance, 89% of older males and 90% of older females did not want to work anymore. Those aged 45-54 or older who were single appear to have a greater willingness to work, 16% and 18% respectively, when compared with those aged 55-64, 5%, and other marital status groups, 5%. Furthermore, those with low levels of education had the least enthusiasm to return to work after becoming economically inactive: only 4% wished to work, while 92% did not want to work anymore.

4.10 In summary: factors relating to the employment condition of older

Taiwanese

In short, as Table 4.5 shows, with regard to the influential factors concerning older people's employment conditions, occupation and education also play roles in determining older people's employment conditions. For example, low educated, low skilled or manufacturing workers were more likely to work part-time, which were usually not favoured choices in Taiwan, and these older people more often worried about the stability of their employment.

Table 4.5 Universal and problematic circumstances by employment status among older

Taiwanese

Status	Universal and problematic circumstances		Problematic circumstances by factors
Employed status	Universal	Working in full time (94%) and in service sectors (57%)	<u>Who worked in part-time:</u> females, low educated, aged 60-64, low skilled, or manufacturing workers
	Problematic	Worry about stability of employment (losing jobs) (32%)	<u>Who had more anxiety:</u> aged 45-49, low educated, low skilled, or manufacturing workers
Unemployed status	Universal	Looking for low-skilled or manufacturing jobs (61%)	<u>Who preferred these jobs:</u> low educated or males
	Problematic	Low self-confidence upon job-seeking (85%)	<u>Who had lower self-confidence:</u> female, old-older (aged 55+) or low educated
Economic inactive status	Universal	Early exit (male at aged 57; females at aged 48)	<u>Who were more likely to exit early:</u> females
	Problematic	Low motivations to return to work	<u>Who had lower working motivations:</u> aged 55-64, low educated, widowed/divorced or married/ cohabitant

It appears that gender, age and marital status had significant impacts on the employment condition of older Taiwanese. For instance, older males were keen on low-skilled or manufacturing jobs; by contrast, females were more likely to work part-time or exit at a

fairly early age. Apart from demographic factors, the anxiety of losing employment, low self-confidence and low motivation have become problematic in relation to the probability of employment among older Taiwanese's. For instance, one-third of employed older Taiwanese had concerns about losing their jobs; especially those who were younger-old (aged 45-54), low skilled, low educated or manufacturing older workers, who all exhibited greater concerns. The majority of unemployed job-seekers had rather low confidence when job-seeking (particularly female, old-older or low educated). Finally, early exit (females) and low motivation to return to work (aged 55-64, low educated, widowed/ divorced or married/ cohabitant) are prevalent circumstances among the economically inactive older Taiwanese. Needless to say, these conclusions hint that the possibility of returning to an economic active status for these economic inactive older Taiwanese is significantly limited.

FACTORS OF EMPLOYMENT CIRCUMSTANCES FOR OLDER TAIWANESE'S

In this section, the analysis is mainly based on the *Taiwanese Manpower Survey* dataset and the older people referred to are those aged 45 and over. Questions in this survey are used to categorise economic status into three groups, employed, unemployed and economic inactive, and include: 'Did you go to work during last week?', 'How many hours did you work last week?', 'Why did you not go to work last week?', 'How many weeks have you not gone to work?', 'What kind of work are you looking for?'.

First, those aged 45 and over who went to work last week (or had a job but did not go to work that week) followed by details about working incomes, occupations, regions were selected as 'employed older people' (full time is taken to mean working more than 35 hours per week; part-time, less than 35 hours). Second, those who indicated that they did not have a job but were job-seeking or wanted a job, followed by details about the length of their unemployment and expectation of occupation, were grouped as 'unemployed older people'. Finally, those who stated they did not have a job and did not want to look for a job because they were studying, or looking after a household, were aged 65 or over, or disabled, or just wanting to stay at home, were seen as 'economically inactive older people'.

In general, the distribution of older participants' employment conditions in this research was similar to the above analysis of the DGBAS official report in some respects. The results showed that older people were more likely to be economically inactive rather than employed, 50% and 42% respectively (N=27,534). Two out of three of those who were economically inactive was due to them being aged 65 and over, or disabled, whilst one third were doing looking after a household.

By contrast, only 1% of those aged 45 and over stated that they were unemployed in *Living Conditions of Middle-aged and Older People in Taiwan* (DGBAS, 2008). The proportion of those that considered themselves to be unemployed in the Taiwanese Manpower Survey was much higher, at 8%, which was also much higher than the official unemployment rate for those aged 45 and over, which was 4 % (DGBAS, 2011). This finding implies that the government calculations of older people's unemployment might be biased in terms of estimating the unemployment rate of older people.

With respect factors influencing older people's economic conditions, the results show that the distributions of economic conditions are statistically significant by the above mentioned factors; for instance, by gender ($\chi^2=2990^{***}$, $df=2$), age ($\chi^2=12558^{***}$, $df=114$), educational qualification ($\chi^2=2653^{***}$, $df=4$), marital status ($\chi^2=1121^{***}$, $df=4$), occupation ($\chi^2=26747^{***}$, $df=72$) and region ($\chi^2=47^{***}$, $df=6$). These results suggest that these factors could be seen as influential factors on older people's employment conditions. The following explores how each factor impacts on the employment of older Taiwanese.

4.11 By age

In general, those aged 45-54 were more likely to stay employed compared to those aged 55 and over (71% aged 45-54 and 24% aged 55 and over). Among these employed populations, the distribution of income levels by the two age groups were significantly different ($\chi^2=503^{***}$, $df=4$). It seems that older workers were more likely to work with lower salaries; 30% of those aged 45-54 were in the highest income quintile and 24% in the lowest; by contrast, the majority of those aged 55-plus were in the lowest income quintile (44%) whereas 23% were in the highest. Also, proportion of those aged 45-54 who were

unemployed were lower than those aged 55-plus, at 6.8% and 8.4% respectively, which means that the aged 55-plus group was more likely to become unemployed.

4.12 By gender

Looking at gender, 53% of older males as well as 31% of older females were employed, which shows that older females appear less likely to remain in work. Moreover, the payment gap was highly significant by gender ($\chi^2=1571^{***}$, $df=4$), half of older females were in the lowest income quintile, compared with 20% of males. Only 14% of females were in the highest income quintile, compared with 35% of older males. With respect to the unemployed, a cross-tab analysis showed that the probability of being unemployed for older males' was higher than that for older females: the male rate of unemployment was four times that of older females, 12.4% and 3.2% respectively. As for being economically inactive, the statistics show that the proportion of older females becoming economically inactive is twice as high. Looking at reasons for being economic inactive, there is a significant gender difference ($\chi^2=3582^{***}$, $df=3$).

4.13 By educational qualification

In terms of qualifications, older people who had ordinary higher education degrees were more likely to be economic active compared with those with lower levels of education. As the data shows, the percentage of the highly educated group that was employed was double that of the lower educated group, 62% and 32% respectively. Distributions of income by educational level were also significantly different ($\chi^2=2842^{***}$, $df=8$). Low educated older people were more likely to be in the lowest income quintile, 45%, and they had the least

likelihood of being in the highest income quintile. The percentage of those in the lowest income groups between the high and middle educated groups were similar, at three out of five; but the data suggested that highly educated older people were far less likely to be in the lowest income quintile compared to the other two education groups. As for the economically inactive population, lower educated older people were more likely to be economically inactive: two-thirds, double the middle and highly educated groups.

4.14 By region

The proportion employed in the three regions varied from 41% to 43%; older people living in urban and manufacturing areas had a slightly higher probability of remaining in work. In terms of regional income levels, the distributions were significantly different ($\chi^2 = 587^{***}$, $df=8$); the difference was mainly between urban/manufacturing and rural areas. In urban or manufacturing areas, more than one-third of older workers were in the highest income quintile. By contrast, only one-fifth of older people living in rural areas were in the highest income group: the majority, 40%, were in the lowest income group. The urban and manufacturing areas also appeared to have a much higher unemployment rate, the highest, in urban areas, being 8.8%. Those economically inactive within the three regional groups were similar, from 49% to 51%, but this proportion for older people living in rural areas was just a little higher, at 51%.

4.15 By marital status

With respect to the categorization of older people's marital status into subgroups, Taiwanese official reports broadly divide individuals into two: married/cohabiting or non-

married (including single, widowed, divorced/living separately) in order to determine the impact of having a partner or not upon an individual's employment probability of finding employment. Based on this method, results show that 47% of older people were married (or living with partners) were economically active, but, only 28% of older people who were non-married (single, divorced, living separately or widowed) were employed. Income levels also appeared to be considerably different according to marital status ($\chi^2 = 188^{***}$, $df=4$); married older people were more often in the highest income quintile, 31%, compared with 16% for the non-married; there were, however, still one-third of married older people in the lowest income groups as well as 34% who were non-married. The percentage unemployed within the married group was higher at 8%, compared with 7.7% for the non-married. Moreover, two-third of non-married older people was economically inactive, 64%, while 46% of those married were in this category. Amongst the reasons for being economically inactive, it was found that 78% were 'aged 65 or above, or disabled'.

Applying such a categorisation to this research might be problematic since it could underestimate the unemployment rates among those who were single or divorced. As the Taiwanese Manpower survey data shows, a large number of the 'non-married' older people were widowed, 64%, and the proportion of those economically inactivity were overwhelmingly high, at 82%, with low employed and unemployed rates, 16% and 4% respectively. Furthermore, by excluding these widowed cases from the non-marital subgroup, surprisingly, the proportion unemployed of those other non-married people (only including single or divorced/living separately) increased to a very high level, from 7.7% to 14.7% and the proportion employed increased from 28% to 52%.

With respect to this research, it is more interesting to determine the types of barriers which limit the probability of employment by an older person, either remaining in work or returning to work. Older participants who were widowed will be excluded from the following quantitative analysis; instead, the impact of marital status on older people's employment probability or barriers to employment will be compared mainly between those married/cohabiting or single/divorced. In this instance, the statistics show that the economic status differed between these two marital groups ($\chi^2 = 479^{***}$, $df=2$), with the single or divorced were slightly more likely to be employed, 52%, compared to the married, 47%. Moreover, the percentage of those unemployed and single or divorced was 14.7%, which was much higher than for those married, 8.0% , with the average unemployment being 7.8%. Also, the results show that those married were more likely to be economic inactive, 44%, compared with those single or divorced, 33%.

4.16 By occupation

With respect to the working occupations among all employed older people, as Table 4.6 shows, the three dominant occupations were *Service workers and shop and market sales workers*, 23%, *Skilled agricultural and fishery workers*, 20%, and *Plant and machine operators and assemblers*, 15%. This implies that older workers more likely to work in the service sector, low-skilled or manufacturing jobs.

With respect to distribution of older worker's occupations by age, gender, education, marital status and region (the three most popular occupations within each subgroup is highlighted in **bold**), the diversity by each factor appears to be statistically significant. Within two age groups, diversity is significant ($\chi^2 = 558^{***}$, $df=8$); and the results show that those aged 45-54

were more likely to work in professional or skilled jobs, for instance, 22% of those aged 45-54 were *Professionals or Technicians and associate professionals*, compared with 13% of the aged 55 and over; but, the proportion of those working in managerial jobs were equal at around 6% for both age groups. Although the majority of older Taiwanese preferred to apply for low skilled jobs, such as *Plant and machine operators and assemblers* or *Elementary occupations*, the statistics show that old older people appeared less likely to work in these jobs, 19%, compared with 24% for those aged 45-54. By contrast, 30% of those aged 55 and over worked as *Skilled agricultural, forestry and fishery workers*, and 14% aged 45-54.

Table 4.6 Distributions of occupations of employed older workers' working jobs (%)

		Occupations*	1	2	3	4	5	6	7	8	9
Total			6	5	12	5	23	20	6	15	8
Age	Aged 45-54		6	6	16	5	22	14	6	17	7
	Aged 55+		6	4	9	3	24	30	4	11	9
Gender	Male		9	5	14	2	17	24	7	17	5
	Female		2	5	13	8	33	12	2	12	12
Education	Low		2	0	2	1	25	32	6	19	12
	Middle		6	1	18	9	28	10	6	18	5
	High		16	23	34	6	11	2	3	3	1
Region	Urban		9	8	19	5	23	7	6	14	8
	Manufacturing		8	8	17	5	23	9	5	17	7
	Rural		4	3	9	4	23	30	5	15	8
Marital status	Married		7	5	14	4	23	20	6	15	7
	Single/divorced		4	5	10	5	26	19	4	13	13

Occupation by number*: 1. Legislators, senior officials and managers; 2. Professionals; 3. Technicians and associate professionals; 4. Clerks; 4. Service workers and shop and market sales workers; 6. Skilled agricultural and fishery workers; 7. Craft and related trades workers; 8. Plant and machine operators and assemblers; 9. Elementary occupations

Differences in the distributions by gender and occupations were significant ($\chi^2=1136^{***}$, df=8) with results showing that more females worked as *Service workers and shop and*

market sales workers, 33%, compared with males, 17%. In contrast, more males were *Skilled agricultural and fishery workers*, 24%, *Plant and machine operators and assemblers*, 17% and *Legislators, senior officials and managers*, 9% if compared with 12%, 12% and 2% respectively for females.

With regard to the distribution of occupations by education ($\chi^2=5916^{***}$, $df=16$), it is not surprising that the highly educated often worked in managerial, professional and high skilled jobs, 83%, but the proportion as *Service workers and shop and market sales workers* and *Plant and machine operators and assemblers* among the low/middle educated was much higher than the high educated group. In addition, the middle educated were more likely to be *Technicians and associate professionals* or *Clerks*. One-third of low educated older workers were *Skilled agricultural and fishery workers* and they were more likely to be in *Elementary occupations*.

The distribution of older workers' occupations by region is also statistically significance ($\chi^2=1226^{***}$, $df=16$). In general, the number *Service workers and shop and market sales workers* were equivalent within the three regions, at around 23%; but, it was found that percentages working in high positions or highly skilled jobs, such as *Legislators, senior officials and managers*, *Professionals* and *Technicians and associate professionals* were much higher in urban and manufacturing areas rather than in the rural areas. Also, the proportion working as *Skilled agricultural and fishery workers* in rural areas was much higher than in rural areas; and the percentage of *Plant and machine operators and assemblers* in manufacturing areas was slightly higher than the other two as well.

Occupations within the two marital groups were also significantly diverse ($\chi^2 = 135^{***}$, $df=8$) and the percentages of single or divorced groups who worked in *Elementary occupations* were twice as high than those married; also, it seemed that married older people were more likely to work in high positions, 7% for *Legislators, senior officials and managers*, or high skilled jobs, 14% for *Technicians and associate professionals*, compared with 4% and 10% respectively for the single or divorced .

To sum up, a number of observations about the impact of factors influencing older people's employment conditions and circumstances have been obtained here (see Table 4.7). First, a number of subgroups appeared to have a lower possibility of remaining in employment; for example, percentages of being employed among the 55-plus group, females or low educated older people were considerably lower than the average. Second, with respect the proportion unemployed, some subgroups were much higher than the average and also higher than the comparative subgroup: these were those aged 55-plus, males, middle educated, highly educated, those living in urban or manufacturing areas and the single or divorced.

Third, with respect to income levels, the results show that older people were concentrated in either the lowest or highest quintiles; one-third of the older employed population were in the lowest income quintile and nearly one-third in the highest one. On the one hand, the percentage in the lowest income groups were particularly higher in some subgroups, such as those aged 55-plus; females; lowly educated; those living in rural areas; or the single or divorced. Older workers that were aged 45-54; males; highly educated; or living in urban or manufacturing areas, were more likely to be in the highest income groups.

Table 4.7 The employment probability by individual factors (%)

Subgroups		Employed			Unemployed	Economic inactive
		Ratios of being employed	In the lowest income quintile	In the highest income quintile	Ratios of being unemployed	Ratios of being economic inactive
Total		42	31	28	7.8	50
Age	Aged 45-54	71	24	30	6.8	23
	Aged 55+	24	44	23	8.4	68
Gender	Male	53	20	36	12.4	34
	Female	31	50	14	3.2	66
Education	Low	32	45	12	6.4	61
	Middle	60	23	29	9.3	30
	High	62	8	64	11.9	27
Region	Urban	43	20	36	8.8	50
	Manufacturing	43	22	36	8.3	49
	Rural	42	40	21	6.9	51
Marital status	Married	47	31	30	8.0	44
	Single/divorced	52	35	16	14.7	33

Typed in bold= higher than the average ratio

4.17 In summary: two types of older Taiwanese workers

Based on the above findings (see Tables 4.2, 4.3, 4.4, 4.5 and 4.7), the first research question has been answered in detail; that is, the age, gender, education, marital status, region and occupation can be seen as significant factors closely associated with the employment circumstances and motivation for working in older Taiwanese. Moreover, with regard to the second question, what types of older Taiwanese sharing similar problematic employment circumstances, based on the above findings, two clusters of older people have been grouped in terms of employment probability (being employed or unemployed) and their income levels.

The first cluster is those older Taiwanese who have 'low employment rates and low incomes', including those aged 55 and over; females; and lowly educated older people. The older Taiwanese in this group appeared to be more likely to withdraw from the labour market or work in very low paid jobs. Therefore, they might encounter similar employment barriers when compared with the second group. For instance, as Table 4.5 shows, some subgroups might have a greater likelihood of worrying about losing their current job (if employed); have lower confidence about later job-seeking (if unemployed); or have a lower motivation to work (if economically inactive).

The second cluster refers to older Taiwanese who have 'high employment rates but high unemployment rates', including males, middle and highly educated, single or divorced, and older people living in urban/manufacturing areas. Older Taiwanese in this group appear to be more likely to remain in employment but also are more likely to be unemployed. It is assumed that these older people might have a greater motivation to work, but commonly

might have more difficulty returning to work after becoming unemployed. With respect to potential employment barriers, some might be concerned with stable employment (e.g. older manufacturing workers) and others might not have much flexibility in terms of expectation of later jobs (e.g. male job-seekers) (see Table 4.5).

Nevertheless, a few controversial findings within the different datasets are sensed here. On the one hand, as results from the Statistics of Employment Services (Table 4.4) show that older Taiwanese job-seekers in the PESS who, first, live in the urban areas or, second, have high educational qualifications, appear less likely to find new working opportunities when compared with those who live in rural areas or with low educational qualifications. On the other hand, findings from the Taiwanese Manpower Survey (Table 4.7), show that older Taiwanese who live in urban areas or were highly educated appear to be more likely to remain in employment as well as being in the highest income quintiles.

It could be argued that these controversies result from different groups being targeted in each database, for example, the PESS database merely focuses on its older clients, and the Taiwanese Manpower Survey adopts a national sampling frame. However, the reasons for these contrasting results might be more complex; hence, more research is needed in order to clarify how regional and education factors influence older Taiwanese's employment patterns.

In the next chapter, the relationships between individual factors and employment barriers will be addressed using quantitative and qualitative analyses; also, the types of employment barriers the two clusters of older Taiwanese encounter will be explored.

5 EMPLOYMENT BARRIERS AMONG OLDER TAIWANESE

5.1 Introduction

In the previous chapter, it was shown that a number of individual factors, including gender, age, occupations, educational qualifications and marital status, appear to have a significant impact on the probability of older Taiwanese being employed, unemployed or economically inactive, as well as on their income levels. Moreover, two clusters of older Taiwanese have been categorized according to the indentified issues of employment circumstances. Group 1 contains three subgroups, which commonly have low employment rates and low income', including those aged 55-plus, female and low educated older people. Group 2 contains four subgroups which usually have higher employment rates but also have high unemployment rates for older people who are male, middle and highly educated, single or divorced, or those living in urban or manufacturing areas.

As the literature suggests, older people's employability, workability and human capital are likely crucial determinants of older people's flexibility and ability to retain work (Mincer, 1989; Field, 2000; Green, 2003; Matlby, 2011; Shultz and Olson, 2013). Thus, except for demographic factors, it is likely that other older people's individual factors, such as health, financial security, skills, work experience and income level, attachment to jobs and so on, are significant determinants towards later employment (see Chapter 2).

This chapter attempts to answer the second theme, 'employment barriers among different types of older Taiwanese' employment circumstances'. The first part of this chapter aims to answer the research question, 'what factors influence the employment barriers among different types of older Taiwanese workers', by re-analysing the Taiwanese Manpower

Survey dataset. In this section, the older Taiwanese's employment barriers will be separately discussed in terms of the employed and unemployed. Regarding the employed, how the current income level, working positions, modes of enterprises, and employment stability in relation to job-changing contribute to construct diverse employment barriers between Groups 1 and 2 of older Taiwanese will be analysed. As for the unemployed, how work experience, expectation of later jobs, and limitations and barriers to gain later jobs affect their possibility to return to work will be described.

In the second part, the research question, 'What factors have case managers evidenced as employment barriers', will be addressed through exploring case managers' points of views (by interview data). In this part, the coverage of individual factors is much wider and will provide further understanding of the barriers to employment for older Taiwanese, and how each factor has uniquely influenced the two identified types of the older Taiwanese. In addition, the findings from case managers' interviews might also shed light on the above mentioned controversial results regarding the impact of education and living regions between the PESS' and the national surveys' datasets.

EMPLOYED OLDER TAIWANESE'S EMPLOYMENT BARRIERS

5.2 Income level versus working positions

It has been found that the distribution of income levels for older employed people are concentrated at two ends of the income quintile, either at the lowest (31%) or highest (28%), so it is essential to explore the kinds of factors which might cause this diverse distribution of income levels. According to crosstab analysis, the income levels of the older employer populations is significantly associated with their working positions ($\chi^2=4570^{***}$, $df=16$): the percentages of older people who worked as employers was 7%; 26% were employees in the public sector; 12% were employees in family businesses; 47% were self-employed; and 9% were employed in the private sector.

Regarding distributions of income levels by working positions, the results show that those who work as employers had the highest possibility of staying in the highest income quintile, 70%, followed by employees in the public sector, 61%. By contrast, those who were employees in family businesses, 100%, or self-employed workers, 40%, were more often in the lowest income quintile. This seems to suggest that older workers who participated in family businesses or are self-employed are more likely to become low-income workers, but those who are employers or work in public sectors are more likely to have higher incomes. Although the calculations of working incomes between family members in a family business might be multifaceted, this result highlights the fact that a family business might play an important role in determining older people's employment conditions, as well as barriers for remaining in work in the Taiwanese context; this will be discussed further in the qualitative findings.

Since it has been shown that older workers' working positions are closely linked to their income levels, the following will examine associations of working positions and income levels within Groups 1 and 2. As Table 5.1 shows, older employed people in Group 1 appeared to have a higher possibility of working in a family business or as self-employed workers. For instance, one-fifth of older females worked in family businesses and over one-third of the aged 55-plus and low educated are self-employed workers. This could be one of reasons for the resulting low incomes in these groups.

Compared with older workers in Group 2, it is noticeable that some subgroups were more likely to work in high-income working positions, as employers, or as employees in the public sector. For instance, nearly 10% of older workers who were male, middle or highly educated, or living in urban or manufacturing areas, were employers. Also, those who had higher level qualifications were more likely to work in the public sector. Among these cases, their incomes might be higher than those who worked in family businesses or were self-employed.

However, within the male group, the data shows a rather high percentage who work as self-employed workers and who might suffer with low income, although they also had a higher likelihood to be employers if compared with older female workers (in Group 1). Moreover, the single or divorced also have a higher probability to be self-employed, and this might also influence their possibility of having a higher income.

Table 5.1 Distributions of working positions among employed older people (%)

Subgroups		Employer	Self-employed	Employee in public sector	Employee in private sector	Employee in family business
Total		7	26	12	47	9
Group 1	Aged 55+	7	39	9	34	11
	Female	3	16	12	48	21
	Low	5	35	3	45	12
Group 2	Male	10	32	11	46	2
	Middle/highly educated	9	17	20	48	5
	Urban/manufacturing areas	9	19	13	54	6
	Single/divorced	5	28	10	56	2

Source: The Taiwanese Manpower Survey (2008)

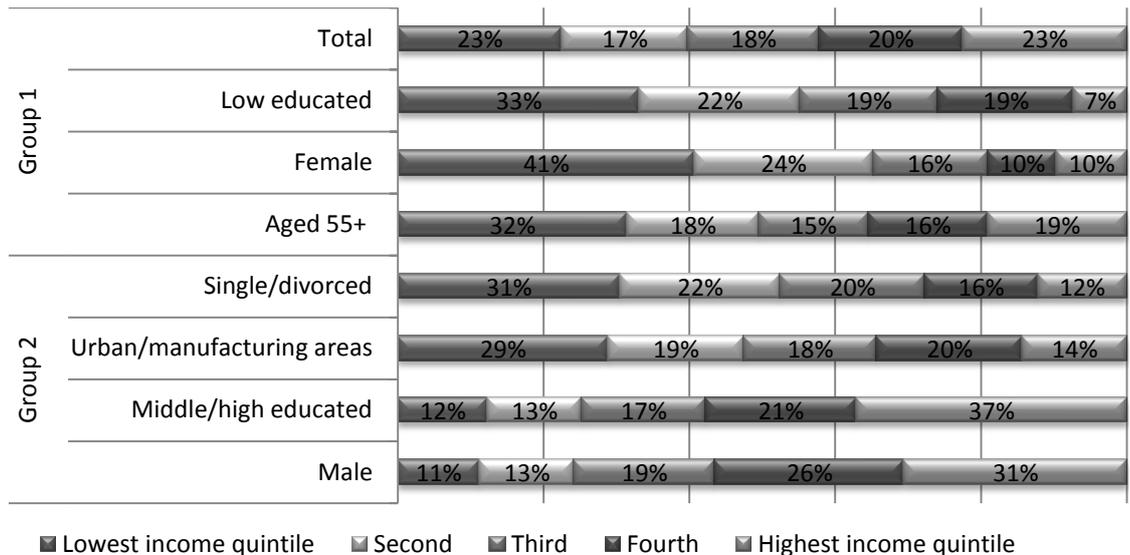
5.3 Income level verse types and mode of enterprises

As the above Table 5.1 shows, 47% of employed older people had worked in private sectors, so this section will examine the older workers were more likely to work in low paid jobs in private sectors.

After comparing the income levels of older employees in the private sector between two Groups, the results suggest that the distribution of income levels were remarkably diverse between Groups 1 and 2; as Figure 5.1 shows, over one-third of older people who worked in the private sector in every subgroup in Group 1 as well as two subgroups in Group 2, including the single or divorced and those living in urban or manufacturing areas, were in the lowest income group. Their likelihood of having jobs with the lowest incomes was three times higher than the middle/high or male group (in Group 2). Meanwhile, the possibility of these subgroups having jobs with incomes in the highest quintiles was considerably lower

when compared with the male and middle/highly educated groups. Thus, it is very likely that, except for the male or middle/highly educated, most of the older workers in the private sector might suffer with low income.

Figure 5.1 Income levels of older workers in private sectors (%)



Source: The Taiwanese Manpower Survey (2008)

Regarding the impact of employment conditions, the statistics show that the distribution between the mode of enterprises and income levels were significantly diverse among older workers in private enterprises ($\chi^2=826^{***}$, $df=12$). In general, within the four variables of mode of enterprises (less than 10 employees, 10-49 employees, 50-199 employees, and more than 199 employees), older workers who worked in the smallest private enterprises (less than 10 employees) have a much higher likelihood of a very low payment; for example, 60% of older workers who were in the lowest income quintile were working in the smallest enterprises, compared with 29%, 9% and 2% working in the enterprises having 10-49, 50-199 and more than 199 employees, respectively.

By contrast, comparing the distributions of income levels among those who work in the large enterprises (more than 199 employees), it has been found that 57% belonged to the highest income quintile, whereas only 4% to the lowest income quintile. The above findings suggest that low income older workers more likely come from the smallest enterprises and those who could stay in the largest enterprises had a greater possibility of work with higher pay.

Indeed, the results show that the diversity of income levels between the low and middle or highly educated groups (low-educated in Group 1, middle or highly educated in Group 2) was significant ($\chi^2=75^{***}$, $df=4$); in the smallest enterprises, the possibility of remaining in the lowest payment quintile in the low educated group was 10% higher than the middle/highly educated group; only 6% of the lower educated older workers were in the highest income quintile, whereas double the proportion (15%) of middle/highly educated older workers were in this income group.

In addition, it has been found that older workers in Group 1 have rather limited opportunities to work in larger private enterprises, and this might also contribute to the prevalence of low incomes among these subgroups in Group 1.

For example, the statistics show that with the larger the enterprise, the percentage of low educated older workers working drops remarkably, from 53% in smallest enterprises to 3% in the largest enterprise, compared with 17% of the middle/highly educated working in the largest private enterprises. Similarly within gender groups (female in Group 1; male in Group 2). The data shows that 54% of older female workers in the smallest private enterprises were in the lowest income quintile, compared with 19% of male workers. Similarly, the percentage

of older female workers working in the largest private enterprises was smaller than male workers, and they were more likely to stay in the smallest private companies.

Overall, the above findings seem to imply that, by comparing older workers in both groups, older people in Group 1 were more likely to stay in the lowest income group even though they were in a private enterprise and that they might also have certain constraints in accessing work opportunities in larger private enterprises offering better incomes.

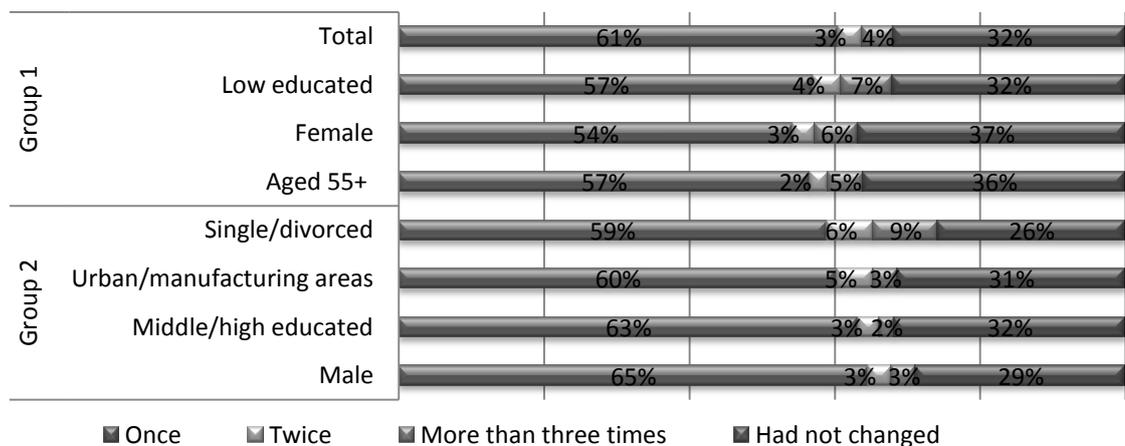
5.4 Employment stability and job-changing

This section explores the stability of employment of older workers by analyzing the frequency with which they change jobs, among the different subgroups. By asking how many times the employed older workers had changed their jobs within the last year, nearly seven out of ten had changed at least once in 2007/8 (61% changing once, 3% twice and 4% more than three times). Furthermore, the frequency of changing job were statistically significant according to position as well ($\chi^2=26^*$, $df=12$); perhaps surprisingly, it showed that employers had the highest likelihood of changing their jobs, 91%, followed by 80 % of self-employed workers, 73% of public sector employees, 66 % of employees in private sectors and 42% of workers in family business. Therefore, it seems that family business workers might have a higher possibility of retaining the same jobs, whereas employers and the self-employed have the least possibility of doing so. However, considering the number of job-changes, employees in the private sector were more likely to change more than once (10%), while the majority changed only once. Taking income levels into account, the distribution of the number of job-changes by the five income quintiles were significantly different ($\chi^2=30^{**}$, $df=12$). Older people in the highest income group appear to have a higher probability of

changing their job once with those on low incomes more likely to change their jobs more than once.

Moreover, cross-tab analysis showed that the job-changing frequency was significantly diverse according to education qualifications ($\chi^2=7^*$, $df=3$). As Figure 5.2 illustrates, middle and highly educated had higher rate of changing jobs once than the lowly educated, but the low educated have a higher probability to change their jobs more than once: 11% compared with 5% for the middle and highly educated. In addition, it shows that women and those aged 55+ appeared more probably to stay in the same jobs in 2007/8; by contrast, men and the single or divorced had the least likelihood of doing so.

Figure 5.2 Frequency of job-changing in 2007/8 (%)



Source: The Taiwanese Manpower Survey (2008)

In terms of the reasons for changing jobs in 1997/8, 48% changed their jobs for involuntarily and 36% changed their jobs for voluntary reasons. Results of cross-tab analysis showed that it varied significantly according to the older workers' genders ($\chi^2=29^*$, $df=17$), education ($\chi^2=54^{***}$, $df=17$), regions where they lived ($\chi^2=34^*$, $df=17$) and marital status ($\chi^2=34^{**}$,

df=17). A number of similar reasons for both Groups 1 and 2 were found. Most of them had been forced to change their jobs because of “shrinking working opportunities” (18%), or ‘the end of working contracts and could not extend it (9%), and nearly 15% had chosen to leave their formal jobs as a result of “poor pay” in Groups 1 and 2.

The data suggests that older women or low educated workers (in Group 1) changed their jobs more often because they are “turning to working in paid-jobs (from unpaid-jobs)” (10%), or because of a “poor working environment” (8%). By contrast, older men, middle/highly educated, single/divorced workers (in Group 2) had a higher probability of changing their jobs (15%, 17% and 13% respectively) because of “changing working identity - from being employers to being employees” (which implies that they might have closed their personal/family business in 2007/8); moreover, one-tenth of older workers in Group 2 chose to change jobs because they wanted to try new working places.

The above analysis seems to show that many older workers who changed their job had suffered from involuntary unemployment, although they returned to work quickly; also, low pay, as well as the working environment, emerged as vital barriers in terms of stability of older people’s employment. Meanwhile, given that certain percentages of older workers in Group 2 had suffered from the termination of their own businesses, it is, therefore, assumed that the economic factors at the macro level had already brought out one kind of employment barrier for older workers.

Furthermore, it has also been found that employment rates among older workers in Group 1 might have increased in 2007/8, because one-tenth of older female or low educated workers had changed their economic status, from economically inactive to paid workers; however,

reflecting on the above findings, it is likely that these ‘new returners’ might also encounter low pay issues or limited accessibility to work in larger enterprises.

5.5 Occupations and job changing

This section compares older workers’ occupations within the two groups before and after changing job. As Table 5.2 shows, there is a noticeable increase in the proportion of older workers working as *service workers and shop and market sales workers*, from 25% to 30% in Group 1, and from 18% to 26% in Group 2. In fact, except for the proportion of *legislators, senior officials and managers* having increased in both groups, it shows that moving towards service sector jobs was the mainstream among these job-changing older workers. It is therefore fair to assume that working in the service sector could be seen as a more accessible option for those changing jobs or returning to work in 2007/8.

Table 5.2 Occupations before and after job-changing among employed older people (%)

Occupation*		1	2	3	4	5	6	7	8	9
Group 1	Last job	3	4	9	2	25	14	4	16	22
	Current job	4	3	8	3	30	14	2	13	23
Group 2	Last job	7	8	17	5	18	10	6	17	12
	Current job	9	6	15	3	26	7	5	17	12

Occupation by number: 1. Legislators, senior officials and managers; 2. Professionals; 3. Technicians and associate professionals; 4. Clerks; 5. Service workers and shop and market sales workers; 6. Skilled agricultural and fishery workers; 7. Craft and related trades workers; 8. Plant and machine operators and assemblers; 9. Elementary occupations*

Source: The Taiwanese Manpower Survey (2008)

Regarding the decreasing proportion of occupations from the last to current job in Group 1, it appears that those working as *Plant and machine operators and assemblers* had decreased by 3%, which was the most obvious in this group, and 2% in *Craft and related trades workers*.

It hints that most of the older workers changing jobs in this group were more likely to change from low-skilled or manufacturing jobs to service sector jobs; the movement of distribution of occupations in this group seemed to be better parallel levels of working skills.

By contrast, the decreasing proportion of occupations from the last to current job among older workers in Group 2 is more varied; including *Skilled agricultural and fishery workers*, 3%, *Clerks*, 2%, *Technicians and associate professionals*, 2%, and *Professionals*, 2%. This result implies that older workers in Group 2 who change jobs appear to be more likely to change either from low-skilled to service sector jobs (parallel) or from professional/skilled to service sector jobs (downward).

In sum, although the change of working incomes or positions among these job-changing workers is unclear in this dataset, the above findings seem to suggest that older workers in both groups had not changed their jobs by promotion (upward), but more often changed from high-skill/professional jobs to service sector jobs (especially in Group 2). Moreover, taking reasons for changing jobs into consideration (one-third of older workers changing jobs in Groups 1 and 2 did so involuntarily), it is likely that the majority of older workers might encounter difficulties in trying to remain in the same occupation or find jobs with similar skill levels but, instead, have to accept or choose to work in the service sector.

5.6 Willingness and job-changing

In addition, regarding responses to the question, 'have you wanted to change your current job or gain an additional job?', the statistics indicate that older workers' attitudes towards their future job-changing showed significant differences according to age ($\chi^2=50^{***}$, $df=2$), education qualifications ($\chi^2=31^{***}$, $df=2$), marital status ($\chi^2=23^{***}$, $df=2$) and region (χ

$F(2,9^*, df=2)$). Generally speaking, older workers in Group 1 were more likely to express having a desire to look for a new job, or apply for more than one job (especially for females, 5%, and the low educated, 6%), whereas merely 4% expressed the same wishes among all of the subgroups in Group 2. Presuming this question is associated with the degree of satisfaction in their current employment conditions, the above findings seem to suggest that older workers in Group 1 might be more willing to change their current employment conditions.

5.7 In summary: employed older Taiwanese's employment barriers in quantitative analysis

As was mentioned, the key features of the older people in Group 1 appear to have low employment rates and low income. It has been shown that the reasons for having low pay might be the result of their low educational qualifications, low working positions, working in the smallest enterprises or working with a family business. Among those who were employed, the majority had changed jobs once, but they were more likely to change jobs more than once if compared with Group 2; most of all, job-changing older workers changed their jobs involuntarily as a result of 'shrinking working opportunities', 'ending of working contracts and could not extend it' or 'poor payment', but, apart from these reasons, the older workers in Group 1 were likely to change their jobs by 'turning to working in paid-jobs (from unpaid-jobs)' or 'poor working environment'. Additionally, the movement in the distribution of working occupations in this group seemed to be more parallel in terms of level of working skills (from low-skilled manufacturing jobs to low-skilled service jobs).

As mentioned above, the key features of the older workers in Group 2 are that they appear to have high employment rates and high unemployment rates. They are also more likely to

work in high paid jobs as a result of having higher educational qualifications, working in high positions or working in larger companies. However, with respect to stability of employment among the employed in this group, they were more likely to change jobs at least once in their last year (2007/8), especially older males. Most of them changed their jobs for the same involuntary reasons as mentioned above, but a higher percentage changed their jobs for 'changing working identity- from being employers to being employees.' so that implies that some of them had experienced a closing-down of their own businesses. Also, older job-changing workers in Group 2 appear to have a higher likelihood of changing either from low-skilled to service sector jobs (parallel) or from professional/skilled to service sector jobs (downward).

BARRIERS TO EMPLOYMENT FOR UNEMPLOYED OLDER TAIWANESE

In this section, the kinds of barriers to employment that prevents older people who are looking for work from returning to work will be analysed by comparing Groups 1 and 2.

The average percentage of those unemployed among all older people was 7.8% and the mean number of weeks of unemployment was 15 weeks. The median was 4 weeks, which shows that many older workers had been unemployed for around a month, although some older workers were unemployed for much longer than 4 weeks.

To the question, “if there is an opportunity for work, would you start to work right now?”, 100% answered, “Yes, they would”; as for the expectation of later jobs, 98% still wanted to work full-time while 2% were looking for part-time jobs. This suggests that they might all have a strong motivation to return to work and would like for the most part to work full-time.

With respect to the major solution for job-seeking, statistics show that the majority of all unemployed older people search for jobs through the print media, internet or recruiting advertisements (45%); one-third search through the PESS; and one-fifth search through a personal social network (assistance from friend or family). As for their main financial resources during job-seeking periods, it has been found that subsidies from the government or employers play a very limited role; less than 3% claimed public or employer unemployment benefits. By contrast, 64% of unemployed older workers relied on their personal savings and 32% depended mainly on financial support from their family. It appeared that female or low educated older jobseekers were more likely to rely mainly on family support, 49% and 46% respectively.

Regarding reasons for being employed, 82% expressed that they left their last job involuntarily because of “shrinking of work opportunities” or “the ending of temporary or seasonal contracts,” compared with only 12% who were voluntarily unemployed because they were “unsatisfied with working conditions” or “had an illness or were health problems.” Among those who become unemployed involuntarily, 61% were redundant because of “shrinking job vacancies” and 17% lost their jobs because of the “ending of temporary or seasonal contracts.”

5.8 Unemployment between the Group 1 and 2

As Table 5.3 shows, older workers in Group 1 and older males in Group 2 appear to have a higher a possibility of encountering involuntary unemployment; those aged 55 or over showed the highest probability in this situation (88%), followed by the low educated (85%). By contrast, except for male workers, the older workers in Group 2 were slightly more likely to have left their last job through personal choice. With respect to the detailed reasons for being unemployed, a greater proportion of older unemployed workers in Group 2 had been made redundant (shrinking job vacancies). For example, 61% of unemployed older males and 60% of middle/highly educated unemployed, compared with 49% of those aged 55 and over and 51% of females; by contrast, the older workers of Group 1 workers show were more likely to be unemployed due to the ending of temporary or seasonal contracts, for example, 26% of the low educated compared, with 13% of the middle/highly educated. Meanwhile, the results also show that Group 2 older cases were more likely to become unemployed for personal reasons, such as unsatisfactory working conditions, whereas those

of Group 1 had slightly higher proportion made this decision because of illness or health problems, or a desire to exit from paid work earlier.

Table 5.3 Voluntary or involuntary unemployment among employed older people (%)

Subgroups		Voluntary unemployment	Involuntary unemployment	Other
Total		12	82	5
Group 1	Aged 55+	8	88	3
	Female	12	81	7
	Lowly educated	9	85	5
Group 2	Male	13	83	5
	Middle/highly educated	16	78	6
	Urban/manufacturing areas	15	79	5
	Single/divorced	17	74	9

Source: The Taiwanese Manpower Survey (2008)

5.9 Length of being unemployment

Considering the length of remaining in unemployment, the average number of weeks of all older unemployed people was 24 weeks. In contrast to those who were workers in the primary sector, with 61% having been unemployed for 4-12 weeks, those who were workers in the manufacturing or service sectors remained for longer periods in unemployment. For example, one-third was unemployed for 4-12 weeks, one-fifth for 13-48 weeks and one-fifth for 49-96 weeks in both sectors.

Moreover, the results show that the distribution of unemployment length for reasons of being unemployed, voluntary or involuntary, appeared significantly different ($\chi^2=277^{***}$, $df=15$). Comparing the means of weeks of unemployment length, between voluntarily and

involuntarily unemployed older workers, that the results show that, first, those unemployed involuntarily appear to have a higher likelihood of staying unemployed longer than those who become unemployed voluntarily, if only comparing those who were unemployed for less than 12 weeks. For example, as Table 5.4 shows, the proportion of those unemployed for less than 4 weeks in the voluntary group was higher than the involuntary group; by contrast, those who are involuntarily unemployed appear to have a greater probability of being unemployed for between 4-11 weeks (31%), compared to those voluntarily unemployed (27%).

Second, it seems that the probability of staying in long term unemployment was not reduced among those who left their jobs voluntarily; conversely, the proportion unemployed for 24-47 or 48-95 weeks were slightly higher than for older people who were involuntarily unemployed.

Table 5.4 Length of being unemployed of older people (%)

Voluntary unemployed/ weeks		< 4	4-11	12-23	24-47	48-95	> 96
Means	All voluntary unemployment	20	27	20	17	13	3
Means	All involuntary unemployment	17	31	21	15	11	5
Involuntary unemployed							
Group 1	Aged 55+	19	33	21	8	15	4
	Female	22	35	20	8	8	6
	Lowly educated	16	35	22	11	11	5
Group 2	Male	13	30	23	18	12	4
	Middle/highly educated	14	28	20	22	12	4
	Urban/manufacturing areas	16	28	27	18	10	1
	Single/divorced	21	21	16	19	10	14

Source: The Taiwanese Manpower Survey (2008)

Since the majority of unemployed older people became unemployed involuntarily, it is worth examining the distribution of the length of unemployment. As the above table shows, it is noticeable that the subgroups in Group 2 are more likely to remain unemployed long term if looking at the proportion unemployed for 24-47 weeks and 48-95 weeks. By contrast, the lengths of involuntary unemployment lengths among the subgroups in Group 1 are mostly either less than 4 weeks, or 4-11 weeks. This finding seems to imply that those involuntarily unemployed older workers aged 55-plus, females, and low educated, are more likely to recover from unemployment sooner than those who are male, or middle or highly educated, or urban or manufacturing areas, or single or divorced groups. Indeed, among the involuntarily unemployed older people, the male subgroup has the longest average number weeks of being unemployed, at 28 weeks, whilst it was 19 weeks for the female subgroup.

5.10 Unemployment probability by working experiences

In this section, attention will focus on the barriers to employment underpinning the older unemployed work experiences.

Position held and type of employer in last employment

In terms of working positions in last jobs, nearly half were employed in the private sector, followed by 26% who were self-employed; 11% who worked in the public sectors; 9% who worked in family businesses; and 7% who were employers.

Among those who were employers in their last jobs, the statistics show that seven out of ten had owned an enterprise with less than 10 employees (the smallest), and three out of ten had owned a company with 10-49 employees (small). Furthermore, the proportion that were employers in their last jobs was much higher in most of subgroups in Group 2 (except for the

single or divorced group); for instance, the data show that 10% of unemployed older workers who are male, middle/highly educated, or living in urban/manufacturing, are former employers, whereas there are only 3% of females, 5% of low educated and 5% single or divorced. Conversely, the percentage of those being workers in family businesses in their last jobs was much higher in Group 1 compared to those in Group 2. For example, 20% of females came from family businesses, but only 2% of males did; and 12% of the low educated did, compared to 5% of the middle/highly educated.

As for the distribution of unemployed older workers according to modes of employer, the data show that 63% of unemployed older people had worked in the smallest enterprises (less than 10 employees) and only 5% had worked in the largest enterprises (more than 100 employees) (see Table 5.5). It can be seen that the proportion of former employees in the smallest companies were the highest in the low-educated and single or divorced groups, whereas the middle/highly educated and living in urban/manufacturing areas had the lowest rates. Moreover, it appears that the middle/highly educated and living urban/manufacturing areas show a higher likelihood of coming from middle or large companies, if compared with other subgroups.

From the above, it can be seen that the majority of former employers or unemployed older workers largely come from the smallest or small enterprises. Thus, it seems that the termination of small enterprises (or family business) is likely to be an ongoing situation in Taiwan. This situation might increase the risk of older workers becoming involuntarily unemployed. Combined with this finding that the 'shrinkage of job vacancies' has become the dominant cause of older people's unemployment, it is likely that the reduction of job vacancies mainly occurs in the smaller enterprises and family businesses, and this situation

also implies that older unemployed workers might be less likely to gain jobs in the smallest enterprises.

Table 5.5 Size of employing company in last job (%)

Subgroups		< 10 employees (smallest)	10-49 employees (small)	50-199 employees (middle)	> 199 employees (large)
Total		63	22	10	5
Group 1	Aged 55+	63	28	9	0
	Female	61	19	10	10
	Low	72	20	8	1
Group 2	Male	64	22	11	4
	Middle/highly educated	51	24	14	11
	Urban/manufacturing areas	57	22	13	8
	Single/divorced	69	20	4	7

Source: The Taiwanese Manpower Survey (2008)

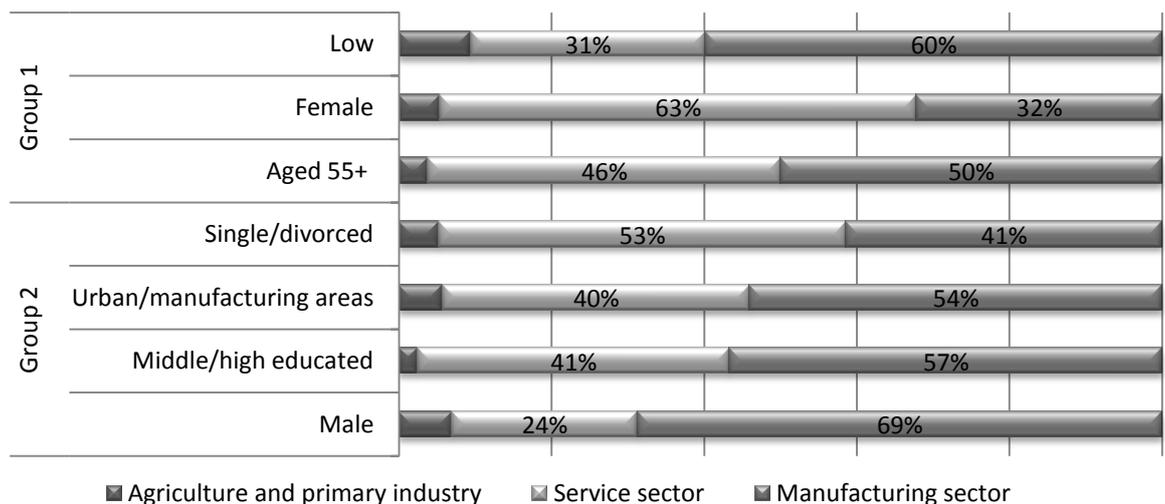
Working industries in last jobs

Regarding impacts of industries worked in, statistics show that older unemployed people come from a number of industries: *manufacturing*, 29%; *construction*, 26%; *distribution, hotels and restaurants*, 18%; and *other services*, 9%. Moreover, it has been found that the possible cause for involuntarily or voluntary unemployment were considerably diverse, according to the types of industries of their last employment ($\chi^2=104^{***}$, $df=56$). For instance, 76% of *manufacturing* unemployed older workers lost their jobs due to ‘shrinking job vacancies’, compared with 63% of *distribution, hotels and restaurants* workers; 53% of *construction* workers; and 50% of *transport and communication* workers. Therefore, it seems that job vacancies in these industries experienced a noticeable reduction for older workers in 2007/8.

Furthermore, comparing the distribution of involuntarily unemployed older workers within the three sectors, it can be seen that three out of five involuntarily unemployed older workers come from the manufacturing sector, whereas one-third of the cases are from the service sector.

As Figure 5.3 shows, the percentage of involuntarily unemployed manufacturing workers are considerably higher in some subgroups, including male; low educated; middle or highly educated; and living in urban or manufacturing areas. There are only two subgroups with a higher probability of being in the service sector in their last employment, including female and single or divorced. An obvious gender pattern can be seen in terms of this circumstance: the majority of involuntarily unemployed older males are usually workers in the manufacturing sector, whereas most of the involuntarily unemployed older females usually come from service sector.

Figure 5.3 Industries of former jobs among involuntarily unemployed older workers



Source: The Taiwanese Manpower Survey (2008)

The above findings seem to indicate two potential barriers regarding older people's employment; first, the reduction of manufacturing jobs has become a barrier in terms of stability of employment for older people. Secondly, there is an obvious gender pattern existing in this labour market with respect to industries worked, at least among involuntarily unemployed older workers.

Working occupations in last jobs

In terms of the impact of occupations, as Table 5.6 shows, the probability of being unemployed voluntarily was higher in some occupations, such as *Professionals*, 75%; *Service workers and shop and market sales workers*, 72%; *Clerks*, 67%; and *Plant and machine operators and assemblers*, 63%. Conversely, older unemployed workers who were used to working in some occupations had a higher involuntary unemployment rate; for instance, 75% of *skilled agricultural and fishery workers* and 60% of *craft and related trades workers*.

With respect to the length unemployed, the statistics show that unemployed workers from a number of occupations had a greater chance of being unemployed longer than others, such as *craft and related trades workers* (34 weeks); *technicians and associate professionals* (31 weeks); *legislators, senior officials and managers* (30 weeks); and *elementary occupations* (29 weeks). By contrast, working as *professionals*, *clerks* and *service workers and shop and market sales workers* generally had much shorter periods of unemployment.

Additionally, the results suggest that unemployed older workers are more likely to be low-skilled workers regardless of their sector. The diversity of distribution of working occupations among the three sectors was statistically significant ($\chi^2=139^{***}$, $df=16$). Briefly, unemployed older workers in manufacturing are more often low-skilled workers, such as

plant and machine operators and assemblers (31%); or *skilled agricultural and fishery workers* (23%); and *elementary occupations* (12%). By contrast, within the service sector, half were *service workers and shop and market sales workers*, and others more often worked in the above mentioned low-skilled occupations.

Table 5.6 Voluntary or involuntary unemployment and length by occupations in last jobs

Occupation*	1	2	3	4	5	6	7	8	9
Voluntary unemployment (%)	54	75	49	67	72	25	40	63	57
Involuntary unemployment (%)	46	25	51	33	28	75	60	38	43
Weeks of being unemployed	30	17	31	20	15	27	34	27	29

Occupation by number: 1. Legislators, senior officials and managers; 2. Professionals; 3. Technicians and associate professionals; 4. Clerks; 5. Service workers and shop and market sales workers; 6. Skilled agricultural and fishery workers; 7. Craft and related trades workers; 8. Plant and machine operators and assemblers; 9. Elementary occupations*

Source: The Taiwanese Manpower Survey (2008)

5.11 Employment probability by expectation of later jobs

In the following, attention will be paid on examining the kind of employment barriers related to the expectation by unemployed older people of later jobs.

By expected industry and occupation

With respect to the industries of expected jobs among unemployed older people, the data shows that 35% wanted to work in the primary sector, 22% in the manufacturing sector and only 15% in the service sector. In terms of expected occupations, as Table 5.7 shows, in Group 1, except for those aged 55 and over, unemployed older people were keener on working as *service workers and shop and market sales workers* or in low-skilled jobs, such as

skilled agricultural and fishery workers, plant and machine operators and assemblers and elementary occupations.

Within Group 2, except for the single or divorced, this group commonly was more likely to seek managerial, professional or high-skilled jobs, especially for *technicians and associate professionals*, compared with Group 1. But there is still large percentage of unemployed older workers in Group 2 interested in low skilled jobs, such as *skilled agricultural and fishery workers* or *plant and machine operators and assemblers*. Therefore, seeking low-skilled jobs seems to be a similar expectation among these older job-seekers.

Regarding the impact of expected occupations on the possibility of older people staying in long term unemployment, the analysis shows that, first, the longest length of unemployment were those who expected to work as *craft and related trades workers*, 34 weeks. Second, it seems that unemployed older workers who expected managerial or high-skilled jobs were more likely to remain unemployed longer as well. For instance, the length of unemployment for those who were looking for work as *technicians and associate professionals* was 31 weeks, and *legislators, senior officials and managers*, 30 weeks. Thirdly, by contrast, the length of unemployment for those who were seeking *service workers and shop and market sales workers jobs*, was 15 weeks, and, *professional jobs*, 17 weeks, and they were more likely of finding work when compared with the average weeks among all unemployed older workers, 24 weeks. Thus, it seems that those looking for jobs as *service workers and shop and market sales workers* or *professionals* might have a higher possibility of finding work, whereas those looking for *craft and related trades workers, technicians and associate professionals* and *senior officials and managers* were more likely to remain unemployed for longer.

Table 5.7 Distributions of expectation of the later job by occupations (%)

Occupation*		1	2	3	4	5	6	7	8	9
Total		3	3	12	8	14	19	4	22	16
Group 1	Aged 55+	5	0	5	5	18	20	4	16	25
	Female	0	0	6	20	29	5	0	17	24
	Low	0	0	3	3	15	25	4	28	21
Group 2	Male	4	4	14	3	8	25	6	24	13
	Middle/highly educated	3	3	12	7	10	24	5	21	17
	Urban/manufacturing areas	4	7	18	9	17	11	1	19	15
	Single/divorced	1	1	11	11	12	23	3	18	20

*Occupation by number: 1. Legislators, senior officials and managers; 2. Professionals; 3. Technicians and associate professionals; 4. Clerks; 5. Service workers and shop and market sales workers; 6. Skilled agricultural and fishery workers; 7. Craft and related trades workers; 8. Plant and machine operators and assemblers; 9. Elementary occupations

Source: The Taiwanese Manpower Survey (2008)

By expected income levels

The proportions of those expecting income levels from the lowest to highest income quintiles were 60%, 13%, 18%, 5% and 4%, respectively (Table 5.8); this indicates that the majority of unemployed older people were looking for low income jobs and only a few expected high income jobs. Moreover, it is apparent that proportion of unemployed older people in Group 1 who were able to accept the lowest income jobs was usually 10% to 20% higher than the subgroups in Group 2.

Conversely, in Group 2, except for the single or divorced subgroup, the percentages of those expecting the highest income jobs were noticeably higher than in Group 1. For instance, none of the unemployed older females were looking for jobs in the fourth and highest income levels, whilst 14% of males were; similarly, only 5% of the low educated expected their job to be in the fourth or highest income levels, but this increased to 15% among the

middle/highly educated. However, it has been found that distribution of income level expectation in later jobs among the single or divorced were rather similar with the subgroups in Group 1.

Table 5.8 Expected incomes of later job (%)

Income quintile		Lowest	Second	Third	Fourth	Highest
Total		60	13	18	5	4
Group 1	Aged 55+	69	8	15	6	2
	Female	77	16	7	0	0
	Low	67	12	16	4	1
Group 2	Male	52	11	23	8	6
	Middle/highly educated	50	14	21	7	8
	Urban/manufacturing areas	58	11	20	6	5
	Single/divorced	63	14	17	5	1

Source: The Taiwanese Manpower Survey (2008)

The results of a correlation test showed that the level of income unemployed older workers expected and the length unemployment are positively associated ($r = .454^{**}$, $p < 0.01$) (three participants whose expected income was extremely high from other selected samples were excluded). This implies that the higher the income that unemployed older job-seekers were expecting from work, the longer the period they may have already been unemployed.

Results of a linear regression test demonstrate that predicting effects of expected income on the length of unemployment is significantly positive ($R^2 = .206^{***}$, $P < 0.001$) (see Figure 5.4); the predicting equation, $Y' = bX + \alpha$, is

$$Y' = 0.01 X + 3.328$$

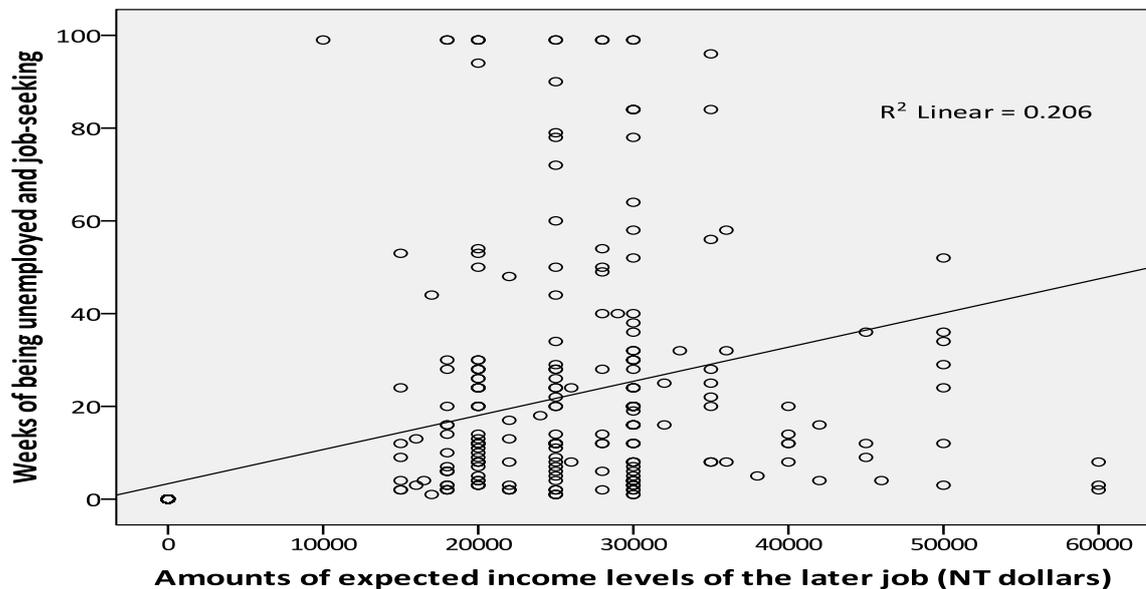
Y' is the predicted score of Y based on a known value of X

b is the slope, or direction, of the line

α is the point at which the line crosses the y-axis

X is the score being used as the predictor (Salkind, 2011:273)

Figure 5.4 Length of being unemployed by expected incomes (with the regression line)



Source: The Taiwanese Manpower Survey (2008)

Furthermore, by examining the length of time unemployed among those who required jobs with incomes in the fourth or highest income quintiles, it was found that they were more likely to stay unemployed for more than a half year; one-third had been unemployed for more than 28 weeks (22% for 28-48 weeks and 14% for 49-96 weeks) whilst only 8% had been unemployed for less than 4 weeks. By contrast, among those looking for jobs with incomes in the lowest or second income quintiles, most had stayed in unemployment for less than 4 weeks, 64%, and only 4% for 49-96 weeks.

These findings seem to show that those who were looking for low income jobs were less likely to stay in long-term unemployment compared with those who preferred higher-paid jobs. Also, it is suggested that the employment probability of those looking for higher-paid

jobs was even more restricted. In addition, given that most of the older people in Group 2 more often expected higher income jobs, as shown above, this shows a positive association between expected income levels and length of unemployment could probably explain why typically a greater proportion were unemployed.

5.12 Limitations and barriers to return to work

In this part, the perceived barriers that prevent unemployed older people from returning to work will be discussed in two parts: the reasons for rejecting available jobs and the perceived difficulties in terms of job-seeking.

Reasons for rejecting available jobs

65% of older unemployed workers had been offered a job at least once after becoming unemployed, but they did not accept this job. Regarding reasons for rejecting these offers (usually more than one reason), low payment turned out to be the widespread consideration among them, 64% having this concern, and 52% suggesting that it as the primary cause. Further, it is noticeable that concerns of commuting time and costs transportation were also rather influential, with 48% giving up their working opportunity for this reason and 21% saying it was the primary reason. Other reasons included considerations about an improper working environment (32%); improper working hours or shifts (26%); did not correspond with personal professions or interests (12%); and lack of opportunities for promotion (8%).

Comparing Groups 1 and 2 (Table 5.9), distributions of reasons for rejecting working offers among those single or divorced (Group 2) were similar with Group 1 and data show that older people in Group 1 appear to be more likely to reject offers of work because of low pay and improper working environments; for instance, 21% of females were limited by improper working hours or shifts, which was three times higher than the average ratio among all subgroups.

Table 5.9 The main reason of rejecting available jobs (%)

Reasons*		1	2	3	4	5	6	7
Total		52	21	9	8	8	1	1
Group 1	Aged 55+	60	20	7	7	0	7	0
	Female	54	8	13	21	4	0	0
	Low	52	15	11	9	11	0	2
Group 2	Male	53	25	6	2	11	2	2
	Middle/highly educated	55	26	5	5	7	2	0
	Urban/manufacturing areas	51	23	6	6	11	2	0
	Single/divorced	59	7	15	7		0	3

**Reasons by number: 1. Low payment; 2. Time and costs of transportation; 3. Improper working environment; 4. Improper working timing/shift; 5. Do not correspond with personal professions or interests; 6. Lacking of opportunities for promotion; 7. Others*

Source: The Taiwanese Manpower Survey (2008)

Within Group 2, except for those single or divorced, percentages of concern for the time and cost of commuting were much higher than Group 1; for example, 26% of the middle/highly educated compared with 15% of low educated; 25% for males but 8% for females. Concerns for personal interest and profession also appear to have slightly more important for Group 2 compared with Group 1; for example, one-fifth of males or those living in urban or

manufacturing areas took this as the main reason for not accepting available work, compared with 0%, 4% and 7% among the aged 55-plus, female and the non-married respectively. However, it was found that 11% of the low educated took this as the main reason, where only 7% of the middle/highly educated did so.

The above findings showed that low pay had significantly prevented older people from taking up employment, even though their expected incomes were usually at a fairly low level (see Table 5.8). In addition, it is possible that concerns of time and costs of transportation might contain two derivative issues: first, accessibility to expected jobs by regions, which refers to whether or not older job-seekers are able to find jobs near their where they live or in the places that they could travel to; second, cost of transport from total income. In other words, the costs of transportation might result in a further decrease of their net wages, especially for low-paid workers, and it might become a significant limitation on employment.

Meanwhile, it has also been highlighted that more than a quarter of older job-seekers' employment probabilities had been limited by issues such as improper working environment, working hours and shifts, as well as personal interests or skills. As was mentioned above, the older people in Group 2 were more likely to work as skilled workers, so this could explain why personal interests and skills appear to be barriers to employment barriers within that group.

Additionally, negative effects from the consideration of working hours or shifts and environment were found in different datasets in this thesis (see Table 4.1, 4.2). However, again, it is hard to know the complex meaning or expectations of working environment and time or shifts from the perspective of the older unemployed. Thus, it is worthwhile to

investigate the meanings and expectations of working conditions in later jobs with further qualitative studies.

Perceived barriers to gain employment

35% of all unemployed older people did not gain any possibility of work after becoming unemployed; this section will focus on their perceived employment barriers by analysing answers of the question: ‘what kinds of barriers have you perceived as the main difficulty to getting a job?’. Overall, as Table 5.10 shows, 61% thought that age issues were the main difficulty preventing them from gaining employment; 18% felt that their employment probabilities were limited by insufficient skills and 15% stated that they could not find a suitable job which might mean that a lack of work opportunities that match with their expectations.

Table 5.10 The main difficulty of being able to find a job (%)

		Limited by age issues	Limited by insufficient skills	Cannot find a suitable job	Limited by educational level	Other
Total		61	18	15	3	3
Group 1	Aged 55+	82	9	0	4	5
	Female	63	11	13	10	3
	Low	56	20	17	4	3
Group 2	Male	56	23	19	0	2
	Middle/highly educated	59	21	18	0	2
	Urban/manufacturing areas	56	20	20	2	2
	Single/divorced	52	23	18	4	3

Source: The Taiwanese Manpower Survey (2008)

Within Groups 1 and 2, it has been found that the majority were commonly limited by age issues, particularly among the age 55 and over (82%). The proportion 'limited by insufficient skills' and 'cannot find a suitable job' were higher in Group 2; by contrast, those in Group 1 were more likely to say that they were mostly 'limited by educational level', especially among females (10%); however, it is noticeable that low educated people themselves were more likely to be limited by age and skills issues rather than their low education.

The above table indicates that 'age issues' were the most widespread cause considered to be the main reasons for preventing these older job-seekers from returning to work, regardless of their personal circumstances. Moreover, it is noticeable that older people in Group 2 were more likely to be limited by insufficient skills and by limited accessibility to their ideal jobs. However, it has to be admitted that the meanings of these highlighted issues remain unknown; for example, it is unclear what were attributed as age issues; the kinds of jobs that were seen as 'suitable jobs'; why insufficient skills were more likely to be the main barriers among the older people in Group 2, rather than in Group 1; and so forth.

Considering these unknown questions, more information from qualitative data will be given in the remainder of this chapter.

5.13 In summary: unemployed older Taiwanese's employment barriers in quantitative analysis

Among those unemployed in Group 1, they are more likely to become unemployed because, first, the ending of working contracts (which also shows that many of them did not work in permanent jobs); they worked in the manufacturing sector (three out of five involuntarily unemployed older workers came from this sector) or perhaps, third, they worked in the smallest enterprises or family businesses (the majority of unemployed older workers had come from these two types of enterprises).

As for unemployed older workers in Group 2, a slightly higher percentage left their last jobs as a personal choice, such as unsatisfactory working conditions, but most also fell into unemployment involuntarily, and they appear to have a higher possibility of being made redundant by the shrinking of job vacancies. They were also more likely to be former employers in the smallest enterprises or employees in larger enterprises or involuntarily unemployed workers in manufacturing sectors.

BARRIERS TO THE EMPLOYMENT OF OLDER TAIWANESE: CASE MANAGERS'

VIEWS

At the beginning of each interview, each participant was invited to share their experiences of two aged 45-plus clients (1 successful and 1 unsuccessful) in order to probe for deeper thoughts about the factors that influence this age group's probability of employment and the barriers to employment (the list of names and locations of participants is given in Table 3.7 above).

Eventually, there were 51 older cases being discussed, 24 successful and 27 unsuccessful (successful cases refer to those who got a new paid-job and worked over 3 months; unsuccessful ones mean those who did not get jobs at the end of service delivery).

As the following table shows, the backgrounds of the older clients discussed were diverse in terms of their personal factors and working experiences, as well as unemployment history, and it was beneficial in gaining a sharper understanding of the factors that influence the probability of employment for older people. Briefly speaking, two thirds were male, one third female; half were married/cohabiting; half were aged 45-49; one third low-educated, middle-educated or highly educated respectively; 70% were employees in the private sector in their last employment; 18 months was the average length of unemployment (minimum= 1 month; maximum= 96 months); 60% were involuntarily unemployed; and the occupations of their former jobs covered nine occupations but there were more *service workers and shop and market sales workers*.

Table 5.11 Provided older clients' background [N=51]

Gender	N	%	Marital status	N	%
Male	35	69	Married and cohabiting	28	55
Female	16	31	Divorced	14	28
			Single, widowed and other	9	17
Age	N	%	Educational degree levels	N	%
Age 45-49	25	49	Lowly educated	12	24
Age 50-54	16	31	Middle educated	19	37
Age 55 and above	10	20	Highly educated	17	33
Mean=51; Min=45; Max=64			Missing	3	6
Working position in last job	N	%	Length of being unemployed	N	%
Employer	7	14	1-3 months	16	31
Self-employed	2	4	4-6 months	7	14
Employees in public sectors	6	12	7-12 months	5	10
Employees in private sectors	36	70	13-24 months	5	10
			>25 months	18	35
			Mean=18; Min=1; Max=96 (months)		
Reason of being unemployed	N	%	Occupation of former main job	N	%
Quit the job (voluntary)	2	4	Legislators, senior officials and managers	11	22
Caring family (voluntary)	5	10	Professionals	4	8
Retirement (voluntary)	4	8	Technicians and associate professionals	3	5
Being redundant (involuntary)	19	37	Clerks	3	5
End of working contract (involuntary)	8	16	Service workers and shop and market sales workers	14	28
Criminal offender (in jail)	5	10	Craft and related trades workers	4	8
Other	8	15	Plant and machine operators and assemblers	8	16
			Elementary Occupations	4	8

Source: participants' provided older clients

As the quantitative results suggested, older employed people who had changed their jobs (one-third involuntarily) might have difficulties staying in same occupation but are more likely to change either from low-skilled to service sector jobs (especially those of Group 1) or from professional/skilled to service sector jobs (especially those of Group 2). Among those who were unemployed, it was found that the majority was looking for service sector, low-

skilled or low-paid jobs, but some in Group 2 might have expected a senior position, skilled or higher paid jobs. Reflecting on the reasons for rejecting available jobs, low pay and transportation time and cost were two major obstacles; moreover, among those who never had any work opportunities, ageing issues were perceived as the dominant limitation, followed by insufficient skills and being unable to find a suitable job. In this section, further the above findings will be discussed further by answering this research question: 'What factors have case managers evidenced as employment barriers?'.

5.14 Health and physical conditions

If older unemployed workers have medical conditions or are disabled, they are less likely to either return to work or find a job that fits with their personal physical conditions. The impacts of physical constraints might overwhelm an older person's motivation to look for work. Older people's appearance also plays a role in limiting their possibilities of finding work (Mrs. Kuo, Mr. Wong, Miss Xie and Miss Lee).

"Physical and health problems are tremendously important among the older people in my opinion; they usually suffer from physical problems so that their employment stability is not very good" (Mrs. Wong).

"limited by her illness, she even could not bear to do simple cleaning jobs...she always said that 'I do like to work in any kinds of job and I need money, but I cannot!'" (Mrs. Huang).

"Many older job-seekers were very eager to work and try very hard to find jobs, but they failed because their appearance did not look good and was much older than their actual ages" (Mrs. Kuo).

Even though some did not suffer from any specific health issue, many participants pointed out that the nature of their declining physical strength still significantly prevented their older clients from working:

“in some services jobs, they are asked to stand up all day; it seems to be tougher for older people to gain this type of work” (Mrs. Ke).

Moreover, this situation was especially more prevalent in Group 1, who were often seeking low-skilled or manufacturing jobs (Mrs. Lin, Mrs. Lee, Mrs. Kuo and Mrs. Wu, and Mr. Lu).

“Some older clients would have liked to apply for low-skilled or manufacturing jobs, but..... they cannot stand still and do the same motion without changing gestures for hours, nor carry heavy stuff and walk from here to there” (Ms. Chen).

“older females were more likely to be limited by their physical strength; consequently, older males may have more choices of working opportunities” (Mrs. Lai) (similar observations by Mrs. Lee and Mrs. Chen 3)

5.15 Understanding of the current labour market and social network

According to Mrs. Lai, the Taiwanese economy had experienced significant growth since the 1970s, and many of her older unemployed clients had stayed in the same jobs from 1970 onwards. Therefore, it was observed that these older people who had worked in the same jobs or companies for many years were probably lacking the understanding employer demands in this labour market, meaning they were unfamiliar with the kind of preparation needed for interviews.

“Many unemployed older people had never thought about the fact that the labour market is changing all the time so they never paid attention to improving their skills, nor thought about how to cope with unemployment” (Mrs. Chen1).

“Even though they started to realise that it is fairly difficult for them to gain similar jobs, such as being a clerk, they did not know what else they could do and often went back to seeking similar jobs” (Mrs. Zhuang).

Indeed, as Mr. Wu indicated, because of having rather poor information about the current labour market, some older people usually took their former working experiences as references for ‘suitable jobs’ and they were usually out-of-date, making it hard to achieve their expectations. Also, Mrs. Huang mentioned that many of them indeed had a higher possibility to gain employment but they just did not really catch on to the contemporary labour market.

Moreover, it has been found that older people in Group 1 (including aged 55-plus, women, and the low-educated) probably had even a narrower understanding of the current labour market, compared with older males or the high-educated. As the participants suggested, this situation is likely related to the breadth of social networks and how much information and assistance they could gain from their social networks after becoming unemployed.

“I told you the truth..... eight out of ten of my older clients eventually gained work through their social network” (Mrs. Lin)

“having someone who could help you or act as your referee is such an important key in job-seeking this is extremely vital for older job-seekers; rarely can they find jobs by only sending out their resumes” (Mrs. Chen 3).

In general, older people in Group 1 often had relatively narrow social networks due to working in low positions or having heavier care responsibilities (Mrs. Lin, Mrs. Chiu, Mrs. Chen 3 and Mrs. Wong, Mr. Wong).

“older men..... usually would actively build up their social networks and they perceived it as their chance to gain more money if they meet the right people..... by contrast, women were more passive in doing so” (Mrs. Lee).

“he was a manager in a bank, so he had a much wider social network; it is indeed very helpful in finding a new job for them” (Mr. Wong).

Furthermore, Miss Chen points out that social network play an even more important role in overcoming the barriers to employment for older people in her working areas (rural areas in south-west Taiwan). She said, ‘if an older job-seeker has a friend who is an authority in some aspects then, it is no problem for his/her job-seeking in Tainan areas’; similar opinions were expressed by Mr. Bai and Mrs. Kuo as well (they both worked in south-west Taiwan, too).

By contrast, it has been found that many employers in highly urbanised and manufacturing areas usually preferred to publish information on the internet. Moreover, most of high-paid jobs were released through this means; therefore, older job-seekers in Group 2 more often had to search jobs on the internet (Mrs. Ke, Ms. Wu).

“in my areas (urban areas), more and more employers like to seek employees online..... in this situation, we do not have any chance to persuade employers to give them (older clients) the chances of an interview” (Mrs. Wong).

“in Hsinchu county (a high-tech manufacturing industry zone), they (employers) greatly rely on the internet and like to contact candidates through e-mail..... older people were poor in doing this” (Mrs. Chen 3)

“as for those who are looking for managerial jobs..... we do not have very many suitable jobs for them and I usually recommended them to search for their jobs on the internet” (Mr. Wong).

Indeed, it appears that the tendency of seeking employees/jobs through print media, the internet or recruitment advertisements has become dominant: 45% of unemployed older job-seekers relied on these methods. But it is suggested that this tendency might be an ineffective way for older people’s job-seeking.

“it is extremely hard for older job-seekers to get an interview through online applications..... too many applications..... most of them did not get any response” (Miss Xie)

5.16 Skills issues

Occupational skills seemed to be a dominant factor affecting the employment chances of older workers and out-of-date skills often become a crucial employment barrier as well. Two problematic situations were recognised here: first, older people who were lacking proper occupational skills (Group 1), and, second, those who had very specific and professional skills (Group 2).

In the first situation, being unable to use a computer had largely limited the employment opportunities of Group 1 older workers because it seems that the majority of service sector jobs which were more suitable for older persons' physical conditions usually required basic computing skills (Mrs. Lin, Mrs. Kuo, Mrs. Lai, Mrs. Chen 3, Mrs. Huang and Mr. Bai, Lu). Moreover, some older workers might have basic computing skills but they were usually out-of-date, which decreased their possibility of competing with younger employees and gaining employment (Mrs. Zhuang and Kuo, and Miss Wu).

“to be honest, I have sympathy for these former manufacturing older workers because they did not know how to use a computer so it was hard for them to apply for office jobs, and they were low-educated, so they barely knew English and would not be accepted by employers in IT companies” (Mrs. Ma) .

Moreover, as for those who aimed at working in manufacturing sectors or as machinery operators, due to the basis of the export-economy in Taiwan, these older people might not easily get these jobs because they could not really read or write in English; this situation was more widespread in high-tech manufacturing-intensive areas (Mrs. Chen).

“in our areas, having a basic English ability is crucial for job-seekers to gain employment; I felt that it is unfair to older job-seekers, though” (Mr. Liu).

“every candidate has to pass an English examination before they are interviewed in many high-tech manufacturing companies and my older low-skilled clients will never pass it” (Ms. Wu).

In the second situation, older unemployed people who had unique occupational skills or had worked in very specific professional areas were more likely to suffer by either constrained job vacancies or lack of up-to-date skills. For example, an older job-seeker was a self-employed painter who could not find relevant jobs because he had no idea about new painting techniques (Miss Wu). Furthermore, some older job-seekers could not find similar jobs after becoming unemployed because, unfortunately, their professional skills were no longer needed and had been entirely replaced by new techniques (Mrs. Chen 3 and Mrs. Ma and Mr. Liu).

In addition, among those who worked as professionals, as Mr. Lu and Ms. Lee observed, 'individual working reputation' appeared to have a rather significant impact on their employment opportunities; older job-seekers who had professional skills but did not have good working reputations were very likely to be potentially excluded from their professional fields.

5.17 Time and cost of transportation

Transportation was an issue for some older people who could not drive or ride a scooter (a very popular form of transportation in Taiwan), in particular the significantly older people (Ms. Wu). Moreover, except for being similar with their former jobs, as mentioned above, another element of a 'suitable job' referred to work near where they lived. As Mr. Lu found, some older job-seekers appeared to have a limited willingness to work outside the area where they lived because they would feel insecure working in an unfamiliar place, so that made it very difficult to find potential vacancies.

Miss Tsai asserted that older people who lived in rural areas had even less enthusiasm for working in other areas, and, she observed, it was indeed very time-consuming for them to travel from rural areas to urban areas (where they had more work opportunities) as in some places, the public transportation is not very well developed in Taiwan. Moreover, corresponding with the quantitative findings, costs of transportation actually play a role in limiting the possibilities of low-paid workers finding work outside the areas in which they lived:

“except for those who were in high-paid or managerial positions, I would not recommend any job for my low-paid older clients and I would discourage them to work in other towns; it is not worth doing” (Mr. Chiu).

However, older women or some care givers were more likely to be concerned about the time taken to commute and said that they had to work near their homes as they needed to take care of their children, grand-children, parents-in-law or ill partners (Mrs. Lin, Mrs. Chen 1); thus, as Mrs. Zhuang said, it is almost ‘a mission impossible’ to find them a suitable job because they also need more flexible working hours.

In addition, the findings show that older people who looked for jobs with higher pay, specific skills or professions (Group 2) might also have a limited possibility to work in their neighbourhoods; but instead, many of them might have to work in other countries (mainly in China) or travel across several counties in Taiwan (Ms. Lee, Mrs. Chen 2 and Mrs. Lee).

“he had worked in many different places, including in China, but he said to me... he is too old and does not want to live away from his family anymore. But there are too few job

vacancies for managers in factories and they would not want older workers here” (Mr. Lu in rural areas).

“it is too competitive for them to gain managerial jobs in manufacturing sectors... but, if they could accept work in China, it might help. Unfortunately, older job-seekers usually do not want to work outside the areas in which they live; younger workers might be ok with that” (Miss Xie, in manufacturing areas).

5.18 Caring responsibilities

It is suggested by participants that older people’s stability and flexibility of employment were considerably limited by caring responsibilities. In fact, conflicts between working roles and caring responsibilities seemed to be a widespread situation. Those at the lower range of the older workers under study often had to care their children as well as their parents or parents-in-law, while some older workers had to care for partners and older generations, even though their children were adults (Mrs. Chen 1, Mrs. Kuo, Mrs. Wong, Mrs. Chiu, Mr. Liu).

“They are burning a candle burning at both ends... they need to work but also need to care for their elders” (Mrs. Wong).

As for caring responsibilities, older job-seekers who bore more caring responsibility more likely affected by time spent commuting when looking for later work and their flexibility for working hours was usually significantly limited. This resulted in a lower possibility for gaining suitable employment (Mrs. Lin, Mrs. Chen 1, Mrs. Kuo, Mrs. Lai, Mrs. Ke, Mrs. Chen 3, Mrs. Wong and Mrs. Chiu). Under these circumstances, some older people who had to care for

their older parents usually could not find any permanent work but undertook temporary work (Mrs. Zhuang and Mrs. Chiu).

“he has to take care his father during the day, so he only could work at night, but, honestly, it is very unlikely that any factory would want him because their factories are 24/7 and everyone has to work different shifts” (Mrs. Ke).

Unsurprisingly, older women were more likely to encounter this difficulty rather than older men. Despite the fact that older women usually had higher pay, it shows that women usually had caring responsibilities as their major duty in families and it indeed strictly narrowed their chances of returning to work (Mrs. Kuo, Mrs. Wong and Mr. Bai). For example, Mrs. Wong indicated that most of her older female clients had directly said that ‘I could and would like to do any job if I could cover my care responsibility in the meantime’.

“she is that kind of mother who always puts her children as priority and would try any possibility to avoid affecting the quality of her family life while job-seeking” (Mrs. Zhuang).

“in fact, I sometimes do not know how to help these older women... there are few jobs that can offer them that much freedom to pick up children from school at 3 or 4 pm everyday..... or take elderly relations to hospitals regularly...” (Mrs. Chen 1).

Therefore, while considering family responsibility, it was also found that employment opportunities for older women were limited by employers’ stereotypes and a reluctance to offer older women jobs.

“I found that older women were less likely to be recruited... employers usually doubt that women are able to give additional effort in their working duty compared with older men”
(Miss Wu).

5.19 Financial responsibility in family

Within the 51 cases cited collectively by the interviewees, it was found that the majority of successful job-seeking cases had a strong work motivation which was driven by financial responsibility in families. Mr. Liu used the term ‘a sandwich generation’ to describe this circumstance.

“I feel that the older workers are somehow like a sandwich generation..... they have to take care and obey their parents or parents-in-law, and also their children... and if they also have to work outside, it is difficult...” (Mr. Liu).

In addition, it is indicated that the consequences of having higher financial stresses often could inspire them to overcome the frustrations of job-seeking and extend their range of acceptable jobs (Mrs. Lee, Mrs. Tsai, Mrs. Lai, Mrs. Huang, Miss Chen, Miss Wu and Mr. Bai).

As for those older clients who are very picky on job types, most of them were financially secure and did not have economic problems in their families (Mrs. Ke).

By contrast, it seems that older people who had a higher financial responsibility in their families were more eager to return to work and the degree of financial stress and motivation to work was positive; the stronger financial stress this age group had, the more keen they were (Mrs. Chen 1 and Mrs. Lin and Miss Chen).

“if they desperately needed money, their job-seeking attitudes were more active and they could even accept working for low pay and for longer working hours” (Mrs. Lee)

However, it was also found that considerations of financial responsibility in families could limit older people’s potential for working in some circumstances; first, some breadwinners in families, usually males, were less likely to accept jobs with lower pay when such pay could not support their families.

“unlike the incomes of older women, which were often supplementary for their families..... I had several older male job-seekers who were bread-winners and they really hesitated to accept low-paid jobs” (Mr. Chen).

“he insists on looking for a high paid job... he told me, otherwise it is far from enough to pay tuition fees for his children and also his family’s living costs” (Mrs. Lai).

Moreover, second, employers might be reluctant to offer low-paid jobs to older male job-seekers because of having similar stereotypes - ‘men usually need to earn more money than women’.

“employers would wonder that their jobs waged only NTD 10,000 to NTD 20,000 per month are sufficient for a man to support his family, and also they would assume that the male workers might leave this job as long as soon as they find another, higher paid one” (Mr. Chen)

Third, according to Mr. Ma, the job-seeking process of those older male job-seekers who carry heavier familial financial burdens was usually corresponded with limited changes to their expectations of incomes.

Overall, it seems that the ‘family responsibility’ had functioned as an employment obstacle for both older women and men but in different ways; as for older women, it seems that they might require more flexibility in working hours (but they could be satisfied with lower paid jobs) and it indeed increases their difficulties to find a job fitting with their demands. Among the older men, it seems that they were usually breadwinners and it caused them to be inflexible in terms of income levels, which might constrain their chances to return to employment.

5.20 Educational qualifications

As was shown above, highly educated older people were twice as likely to stay in the labour market; according to participants, it is likely that low-educated older people’s working opportunities were considerably limited by their educational levels. A number of scenarios are found here. First, with respect to those who were low-educated and also had worked in low-skilled jobs, it is difficult for them to return to similar jobs which they might have the skills to do but where employment is decreasing, due to industrial structural changes; meanwhile, they are likely to have very limited opportunities to compete with young and low-educated workers to gain jobs in industrial companies.

“She is limited by her educational qualifications: looking over all the job vacancies, none of them would accept an employee at primary school level..... they all require at least having a middle-educated level qualification” (Mrs. Lee).

“it is so ridiculous, I do not understand why they require a worker who has graduated from colleges to work in these low-end jobs?! It is total nonsense but it is prevalent” (Miss Tsai).

Worse, combined with rising unemployment rates, a large number of young middle-educated workers applied for those low-skilled jobs after being made unemployed.

Therefore, older people become even more disadvantaged in this labour market.

“in the past, they (low-educated older workers) still had the possibility of applying for work as machinery operators in factories, but, recently, these jobs are all gone...are all are occupied by unemployed younger or middle-aged job-seekers” (Mr. Wong).

“There are so many unemployed job-seekers lately... employers always choose younger ones, and they become even more unwilling to choose older job-seekers” (Mrs. Ke).

Second, as for those who were low-educated but promoted to senior positions, it is even more difficult for them to gain similar jobs because most of these jobs require higher educational qualifications as a result of improvements to the average educational levels in this generation; however, they were lacking similar work opportunities in low-skilled jobs and it made their job-seeking harder.

“he was a manager in a hotel... his working experience is precious but it is really difficult to find him a similar job because his education is only at primary school level” (Mrs. Lin).

Moreover, it was also been found that older workers who were highly educated or had worked in senior positions encountered another employment difficulty; that is, being unable to find their ideal jobs, which will be fully described below.

5.21 Expectations of later jobs

Along with a lack of understanding of the current labour market, it was discovered that older people's expectation of later jobs (normally those similar to their former employment) had functioned as employment barriers in various regards.

First, they had quite limited flexibility in their expectations of working environments, sectors or working hours, and their expectations of later jobs were strongly driven by their past working experiences (Mrs. Chen 1, Mrs. Kuo, Mrs. Ke and Mr. Bai and Mr. Lu). This situation seems to be more common among older males; 'older females were more flexible but older males usually looked for jobs with a very limited range of expectations' (Mr. Chen); Miss Tsai indicated that the majority of working opportunities come from the smallest enterprises or family businesses in her rural working area, and many older clients who had been allowed to work in a flexible working environment usually had difficulties accepting work in a rigid and disciplined working environment.

"it is harder for them to adjust their attitudesthey thought they could not, they do not want to..... perhaps they also are afraid of changing work in new environment" (Miss Xie).

However, along with shrinking working opportunities in the smallest enterprises, it is increasingly harder for them to find their expected jobs. Similar situations were found in other case managers' experiences. As Mrs. Lai states, 'he knew he never has the chance to work in that kind of easy job as he did before for twenty years, but he could just not accept another one.'

Second, they might have higher expectations of income level, which also reduces the possibility returning to work. Mr. Lu observed that those who had particular expectations of

working incomes and positions, mostly males and highly educated, were less likely to gain employment because employers could rarely satisfy their expectations.

“He told me that his working ability and efforts deserved at least NTD 25,000 a month and it was unfair to pay him only NT dollars 18,000 a month.....” (Miss Chen).

“many highly educated job-seekers usually felt that they deserved higher payment..... lowering their expectations of working incomes was seen as an insult to their personal worth” (Mrs. Lee)

It is generally agreed that older people should not be forced to accept low-paid jobs; however, as some participants admitted, only low-paid or low-skilled jobs are more accessible to older job-seekers, especially in the PESS (Ms. Chen, Lee and Xie, Mrs. Wu and Chiu).

“it is really sad to say, but very rarely are high-paid job vacancies open to older people here..... they (employers) potentially only want younger workers” (Mr. Liu)

“I do not blame them for expecting for higher incomes, but... it is true... it is not possible for those aged over 40....” (Mrs. Wu).

Third, as was demonstrated above, more service jobs were open to older workers as well; but, it seemed that fewer older unemployed in Group 2 expected to take these jobs because this occupation had been labelled as feminine or considered to be a bad job (Mrs. Lin, Chen 1 and Huang). Mrs. Wong said the whole of society potentially was prejudiced against some service sector jobs, such as cleaning (‘working like a slave’) and security guards (‘working like a person who is waiting to die’). Likewise, Miss. Chen asserted that some of her older male

clients would never choose to work as a waiter or cleaner, unless their working ability was too poor or their ages were too old to find other jobs.

Moreover, these ideas appeared to have a more negative impact on Group 2 (particularly on older males, middle/highly educated and living in urban/manufacturing areas) accompanied with the notion of 'losing face'.

"he was a manager in a large company, he said to me, his former colleagues would laugh at him if he worked as a salesman in a supermarket because it is a 'woman's job'" (Mrs. Huang)

The meaning of 'losing face' refers to the idea that 'they subjectively and strongly believed that doing these kinds of jobs was very shameful, they never ever wanted to do it nor even thought about it' (Mrs. Wong). Being worried about losing face is critical to older people's expectation of later jobs, including the older males, highly educated or those working in higher positions; in general, service sector jobs, low-skilled or lower positions were sometimes defined as face-losing jobs and this significantly reduced these older people's motivation to take these jobs (Mr. Liu, Lu and Wong and Mrs. Wong, Lee and Huang).

"older males care more about others' perceptions, especially those who were in higher positions, and they feel doing these sales or service jobs they would 'lose face'" (Mrs. Wu)

"he rejected working in those kinds of girly jobs (service workers) and persisted in trying to find work as an operator in a factory; however, he did not understand that the labour market is changing so much" (Mrs. Chiu)

In order not to lose face, some of Mrs. Lee's older male clients even asked for their former employers to offer them their former jobs with a promise to halve their payment; 'this is all

because they do not want to lose their faces, so that they preferred to work in the same jobs but with lower incomes' (Mrs. Lee). Moreover, it also shows that older people are more open to working in low-skilled jobs, but, again, the male, highly educated or those who were in higher positions are reluctant to take these jobs:

"they used to work in high positions or as white collar workers, and they refused any possibility to work as blue collar workers, such as, cleaners or waitresses" (Miss Wu)

"it is difficult for male or high-educated clients to 'serve' others" (Mrs. Ke).

"he really looked down on these available jobs and was reluctant to apply them... for example, he thought that being a security guard in a school is just like a useless watchdog" (Mr. Chen)

Thus, in terms of expectation of later jobs, it is broadly recognised that older job-seekers who were males or had better working positions or educational levels (Group 2) more likely gave up job-seeking after they understood it was hard to find similar jobs (Mrs. Lin, Chen 1, Zhuang, Kuo, Lee, Wu and Huang, Ms. Lee and Xie, Mr. Chen and Wong); as Mrs. Lin stated, "some never came back to see me after they realised that it was very unlikely for them to get the same job at our first meeting".

5.22 Nature of aging issues and stereotypes

The ageing issues are shown to be the dominant perceived barriers to work among the unemployed older workers by quantitative analysis. Considering the nature of ageing issues in depth, it has been found that stereotypes of ageing itself might play a role in shaping the

impact of ageing workers. The stereotypes have two dimensions: older workers towards themselves and employers towards older workers.

Older workers' misjudgement of themselves

There is a tendency that older job-seekers often devalue and misjudge their personal strengths, which results in lower confidence in their abilities.

"He was so frustrated and thought that he did not have any valuable skill, but, I told him, you already have so many good skills and you just need to try to apply for relevant jobs"
(Mrs. Zhuang).

This situation could be seen as a cause of low self-confidence in their job-seeking and in their career, which was identified as a widespread problem among older unemployed in the last chapter (see Table 4.5). As the data shows, it has been found that older people in Group 1 were more likely to have this problematic thought; as Mr. Wong describes, some low-educated or older clients were usually less self-confident and more reluctant to take a risk and try to step out of their world and see what kinds of jobs they could do in the labour market. Therefore, they were less likely to return to work in a short period and 'always stayed in this negative circle and felt that they were useless and hopeless' (Mrs Chen 3).

"I had negotiated with a few employers to agree to interview him; however, he thought that as he is 45 years-old, there is no way for him to compete with other younger workers. He did not go to any of them" (Mrs. Chiu).

In contrast to low-skilled older workers (in Group 1), it appeared that older people in Group 2 (especially males, highly educated or those from higher positions) were more determined

and self-confident at the beginning of job-seeking, but they were very likely to have self-doubts or depression when they realised that they could not find similar work to their former employment (Mrs. Lee, Mrs. Wong and Mr. Wong). Overall, it shows that older people in this group were more likely to become long-term unemployed and needed more time and encouragement to help them cope with the crucial fact that they might not be able to find similar work as before (Mr. Wong, Mr. Lu and Mr. Liu).

“He was an employer and he became very passive and sensitive after being unemployed for a while and he was often hurt by his family or employers in interviews, even though they did not mean it” (Mrs. Chen 3).

“some clients who were highly educated or had senior positions were very confident for their future at the beginning but turned to be quite frustrated afterward; they needed more encouragement” (Mr. Liu).

Employers’ stereotypes of older workers

Second, regarding employers’ stereotypes of older workers, Mrs. Lin, who is also aged 45 or over, shared her personal observations in depth through e-mails after the interviews; moreover, a number of similar statements were found in other participants:

- 1) *Declining physical strength: employers assume that older people’s productivity is not as high as those younger because of ageing (Mrs. Chen, Mrs Tsai, Mrs Lai, Mrs Huang, Mrs Ma and Mrs Zhuang, Mr. Liu, Mr Wong, Mr Chen and Mr Bai)*

- 2) *Management: employers assume that older workers will be hard to cooperate with or won't obey younger managers or will always show off his/her own working experience from the past (Mrs. Chen, Mrs. Tsai, Mrs. Lai, Mr. Liu, Mr. Wong and Mr. Chen, Miss Xie)*
- 3) *Social relationships: employers assume that they cannot work with other younger colleagues as a team due to generation gaps (Mr. Liu, Mr. Wu and Mr. Chen, Miss Xie and Miss Lee, Mr. Wong)*
- 4) *Conservative attitudes: employers assume that older workers are more conservative and lacking in creativity and innovation; also, they might be reluctant to accept or learn how to use new IT products, such as computers (Mrs. Chen 1, Mrs. Chen 3, Mrs. Ke and Mrs. Lee)*
- 5) *Effectiveness: employers assume that older workers will prefer to be cautious rather than try their best to increase effectiveness; moreover, older workers' learning ability and memory are worse than younger colleagues, and they might retire soon. Therefore, the effectiveness of input of occupational training towards older employees could be weakened (Mrs. Lai, Mrs. Chen 1, Mrs. Zhuang, Mrs. Kuo, Mr. Bai and Mr. Liu)*
- 6) *Economic concerns: employers believe that the economic benefits of hiring a young man are much better than hiring an older man in terms of working hours and importance of employment in different ages (Mrs. Lai, Mrs. Chen 3, Mr. Wong)*

From the above statements, despite stereotypes of older people's physical conditions, it seems that management and social relationships in the work environment has become two of the major discriminatory concerns preventing employers recruiting older people.

Moreover, this problematic situation is more likely to affect older people in Group 2, especially those who used to be employers, managers, or had senior positions. The attitude 'I am old/ have more working experiences so I know more' is repeatedly mentioned by participants as the key feature that reduces an employer's willingness to hire them; as Mr. Liu stated

"employers would think..... yes, generally speaking, we need to respect older people's knowledge and wisdom; but, you know..... business is business, if they make mistakes, it is more or less quite difficult to ask them to admit that they are wrong".

By contrast, discriminatory concerns for physical strength, effectiveness and economic benefits more likely became major employment barriers for older workers in Group 1; especially for those who applied low-skilled jobs or in the manufacturing sector (Mrs. Lai, Mrs. Ma, Mrs. Chen 1, Mrs. Chen 3 and Mrs. Chiu and Mr. Bai).

"in the manufacturing sector, they sometimes have to learn how to operate new machines..... the managers believe that younger operators require less training expenditure and learn much better than older operators" (Mrs. Lai)

"Some employers who are looking for operators in their factories would never ever give older job-seekers any chance for an interview because they have already assumed that their physical ability is weak and their eyesight not sharp enough" (Miss. Lee).

Moreover, it has also been found that employers often believe that the physical condition of older employees does not respond to a faster pace of work and rejected their working applications (Mrs. Wu and Mrs. Chiu).

In addition, it was found that employers might prefer to give younger job-seekers jobs rather than older job-seekers because they consider that older people should 'stay at home and enjoy their life rather than work outside' (Mrs, Tsai); Mrs Kuo also stated that employers might believe that giving a job to a unemployed young worker is more morally valuable because society needs to offer the young worker an opportunity to be involved in and to support their families.

5.23 Summary

This chapter aims to answer two research questions. The first question, 'what factors influence the employment barriers among different types of older Taiwanese workers?' is partly answered by the quantitative analysis and the results are summarised in 5.7 and 5.13. The second question, 'what factors have case managers evidenced as employment barriers?' is answered by interviewing case managers and the results are summarised here.

According to the point of view of case managers, the barriers to the employment of older people are complex; some of them correspond with the quantitative findings, such as skills, time and costs of transportation, educational qualification, and expectations of later jobs; but, it was also found that health and physical condition, understanding of the current labour market and social networks, and stereotypes about age also function as employment barriers among older people. Briefly speaking, except for employers' stereotypes, it seems that they had limited possibility to apply for their expected jobs which were similar to their last employment, in terms of flexibility of working hours or shifts, environment, income levels, position, occupation and location and so forth. A number of differences in employment barriers between Groups 1 and 2 were identified.

Employment barriers in Group 1

As for expected jobs among most of the unemployed older workers in Group 1, they were more interested in working in the service sector or in low-skilled, low-income jobs. However, jobs-seekers in this group were more likely to reject jobs because of low payment, improper working environment and the transportation costs and time. Finally, their perceived difficulties to regain employment were ageing issues and low educational qualification.

With regard to the specific barriers had reduced their chances of finding suitable jobs, a number of observations from case managers' statements can be made. First of all, considering the fact that they were more eager or likely to apply for low-skilled jobs in the manufacturing sector, it was discovered that their personal health and psychological condition, combined with employers' stereotypes of older people's physical strengths, noticeably reduces their possibility of being hired for these jobs. Because of working in low-paid jobs, costs of transportation also functioned as an employment barrier; meanwhile, women who had care responsibilities were also more likely to be restricted by the location of jobs in terms of transportation time.

Second, it was found that the older unemployed in this group usually had little understanding of the current labour market, so they might have had more confusion about the jobs they were looking for; meanwhile, they probably had a narrow social network, which has been identified as a very helpful resource in job-seeking. Third, they also suffered from insufficient skills and education qualifications, even though they were interested in doing low-skilled jobs; the main issues about skills was being unable to use computers the way younger employees can and being unable to read or write English. Furthermore, it was

noticeable that most of them had very low education levels, but the requirement of higher levels of education coincides with the appearance of a larger numbers of younger unemployed job-seekers. Thus, their educational qualifications are also a significant barrier as well.

Fourth, regarding expectations of later jobs, the levels of working incomes in positions were less likely to be an obstacle for their employment, but it was shown that those who had worked in business or the smallest enterprises or in rural areas (where it was more possible to work in a flexible working environment) normally had difficulties working in new, rigid and disciplined jobs. Fifth, given that many older job-seekers devalue their own strengths and working ability, it appears that older people in this group were more likely to have low self-confidence and have quite conservative and passive attitudes toward job-seeking. Finally, considering the impact of employers' stereotypes, it has been observed that older people in Group 1 possibly suffered more from prejudiced concerns of physical strength, effectiveness and economic benefits, especially for those who wanted to apply for low-skilled jobs or work in the manufacturing sector.

Employment barriers in Group 2

The data also shows that the unemployed of Group 2 were more likely to stay in unemployment longer than Group 1 (which might partly have caused the high unemployment rates in this group). The expectation of later jobs might have resulted in this problematic situation. They were more likely to apply for managerial, professional, high-skilled or higher paid jobs; however, the statistics show that older job-seekers who were looking for these jobs usually had a longer length of time unemployed.

As for the causes which led unemployed older job-seekers in Group 2 to reject available jobs, 'low pay' was the common, but they were more likely to reject work offers by considering 'costs and time of transportation' and 'personal interests and professions'. Except for ageing issues (which was the major and most common one in two groups), skill issues and being unable to find a suitable job were perceived to crucial employment difficulties.

According to the case managers' perspective, the older people in Group 2 had a relatively smaller possibility of being limited by health and physical strength and might also have had more understanding of this labour market as well as better social networks. However, the specific barriers that had reduced accessibility to suitable jobs for older people in Group 2 (in particular to those who wanted to work in higher positions, skilled or payment jobs) were, first, that they usually had to search for their expected jobs using the internet, which is seen to be an ineffective solution for the older job-seekers; and, more importantly, they might have suffered by either constraints on job vacancies or a lack of up-to-date techniques, if they were looking for jobs with very specific and professional skills; meanwhile, 'individual working reputation' might be an obstacle in their further job-seeking.

Second, they might have been constrained by costs and time of transportation because of having limited possibilities for work in managerial jobs in neighbourhoods or even in Taiwan; briefly speaking, it is likely that being unable to gain their expected jobs where they live and an unwillingness to live separately from their families leads to the transportation becoming a crucial employment barrier.

Third, it appears that having limited possibility to find their expected later jobs is a fairly prevalent and well-known issue in this group. The quantitative findings are supported by the

case managers' statements here; older job-seekers who anticipated higher incomes and working positions were less likely to return to work because it was indeed more difficult to gain these jobs at these ages. Also, it has been observed that they had a high likelihood of rejecting service sector jobs or low paid or low skilled work, because they are worried that they would 'lose face' and feel ashamed by taking these jobs.

Fourth, although they might have had more self-confidence in job-seeking, the data shows that they were more likely to be constrained by self-doubts after being unemployed for a long period; also, it was found that employers' stereotypes had produced negative effects on their working opportunities, including management and social relationships in working environments and being proud of their past working experiences.

How individual factors determine barriers to employment for older Taiwanese in different employment conditions and groups has been fully discussed. In the next chapter, how social and economic contexts shape older people's employment barriers and construct the social attitudes of older people's employment (meaning of employment) will be analysed from the opinions of case managers.

6 EMPLOYMENT BARRIERS AND MEANINGS OF EMPLOYMENT

WITHIN CONTEXTS

Previous chapters examined the perspectives of case managers on the relationships between individual factors and barriers to employment for older Taiwanese. As the literature suggests, the barriers to, and probability of, employment for older people is also associated with employers, policy and relevant economic factors, and socio-cultural factors. With regard to theoretical models, the literature shows that older people's employability or human capital might not only relate to individual factors, but also correlate with contextual factors, such as "household circumstances, work culture and access to resources"(McQuaid and Lindsay, 2005:209-10) as well as "individual attributes, job organizational factors, family factors and socio-economic factors" (Wang and Shultz, 2010:182). Moreover, it is likely that older people's social capital and the ageing culture in relation to social attitudes and the meanings of employment also play roles.

In the following, attention will focus on the last theme, 'employment barriers to older Taiwanese workers and meanings in socio-economic contexts', and on answering the following research questions:

- 5) Which economic and social policy contexts shape the barriers to employment for older people?
- 6) How do social contexts shape barriers to employment for older people?
- 7) How is the meaning of employment in old age constructed in social contexts?

In the first part, the findings of the impact of economic contexts on the barriers to employment for older Taiwanese's will be provided and the distinctness of the employment barriers between the Groups 1 and 2 will be described. Moreover, how economic and social policies have increased these barriers will be discussed as well.

The second part will not only seek to present relationships between employment barriers and social contexts, but also explore how the social contexts shape the meanings of employment in old age in Taiwan and then produce further limitations of older people's employment.

According to findings from the interview data, marital status and gender are identified as central features here. Two reasons are given here. First, family and caring responsibilities have been identified as crucial individual factors creating barriers for the employment of older Taiwanese employment (see 5.18 and 5.19), and, in many cases, the gender model is frequently highlighted as one of the significant social features in determining an older person's employment decision making and behaviour (Smeaton and McKay, 2003; McNair, 2006; Flynn, 2010).

Second, in terms of family hierarchy in the Taiwanese and East Asian context, it has been noted that men and women have a different status and different responsibilities in families (McAleavy, 1955; Cohen, 1976; Davison, and Reed, 1998; see Chapter 2). Therefore, exploring the impacts of gender and marital status factors in different aspects could sharpen insights into the meanings of older people's employment in Taiwan.

ECONOMIC CONTEXTS VERSE OLDER PEOPLE'S EMPLOYMENT BARRIERS

6.1 Changing distribution of jobs by industries and regions

'As you can see..... you can find maybe more than three convenience stores in the same street in many towns' (Mrs. Ke).

Participants generally admitted that, as consequences of urbanisation for several decades, working opportunities in service sectors have replaced the manufacturing sectors' jobs and become the dominant working opportunities in Taiwan; meanwhile, a large number of manufacturing jobs have vanished along with high unemployment rates among workers in this sector (Miss Wong, Miss Chen 1, Miss Chen 2 and Miss Zhunag, Miss Lee, Mr. Bai and Mr. Liu). Thus, in the manufacturing sector, a number of case managers asserted that working opportunities could rarely be found for older job-seekers in Taiwan due to health limitations and employers' widespread stereotypes; practically speaking, product-packing operator jobs is the only possible chance of working in the manufacturing sector (Mr. Lu, Mrs. Ke, Mrs. Wu, Mrs. Chiu and Mrs. Chen 3 and Miss Chen).

In terms of the impact of the increasing numbers of service jobs, some kinds of jobs in service sector, such as retail sales, childcare, security work in communities, schools and other public places, cleaning service and clerks are all more accessible or suitable for older job-seekers (if compared with jobs in the manufacturing sector and taking health and physical conditions into account), (Mrs. Zhuang, Mrs. Kuo, Mrs. Wong, Mrs. Chen 2 and Mrs. Huang, Mr. Wong and Miss Xie). However, the higher accessibility was not only for older job-seekers but also the majority of job-seekers, and it is notable that ageism against older people often made it more difficult for older Taiwanese and limited their opportunities,

especially for *service workers and shop and market sales workers* (Mrs. Kuo). As other case managers said,

“it is impossible for workers aged above 35 to find jobs as clerks in my working areas; they all want younger ones” (Mrs. Zhang in Kaohsiung, the second largest city in Taiwan).

“Employers usually like to hire younger workers as their front-line workers in the service sector because they are more active and look prettier” (Mrs. Ke).

In reality, there are some kinds of jobs in the service sector, as cleaners and kitchen porters, or jobs as security guards, that accept older workers and these indeed have become the dominant working opportunities for the low-skilled, older job-seekers in many areas (Mrs. Zhuang, Mrs. Kuo, Mrs. Wong and Mrs. Chen 2; Miss Wu, Mr. Wong). As Miss Wu said, “in my working areas, if they did not have specific skills, jobs as cleaners became the only possible opportunity for them”. Mr. Wong indicated that “security guard positions were seen as typical jobs for older people... over half of older job-seekers might have considered applying for them”.

However, the above participants also found that older people’s willingness to apply for these jobs was relatively lower among the high-educated, high skilled and males in particular (mainly in Group 2); reasons for rejecting these jobs might be rooted in their personal expectations of later jobs (see 5.21) and employers’ stereotypes of older workers (see 5.22). In other words, among the older people in Group 2, constraints on the accessibility of expected jobs have been worsened by industrial structural changes (the increasing numbers of jobs in the service sector), and older people’s jobs are further limited by their personal expectations of these jobs and employers’ stereotypes.

Given that numbers of jobs in the manufacturing sector has been shrinking, it is not surprising that few chances in this sector are accessible to older job-seekers, particularly if taking the limitations of health and physical conditions and employers' widespread stereotypes into account (Mr. Lu, Mrs. Ke, Mrs. Wu, Mrs. Chiu and Mrs. Chen 3 and Miss Chen). In practice, product-packing operators were seen as the only possible chance of working in the manufacturing sector, and, again, some job-seekers in Group 2 were often reluctant to apply for these jobs because they had a higher level of skills for this type of work (Mrs. Mrs. Wu, Mrs. Chiu and Mrs. Chen 3).

Moreover, the data shows that industrial structural changes varied significantly by region; for example, as Mrs. Ma (a case manager in Taoyuan County, near Taipei, the capital city, and an intensive manufacturing region) stated:

“In Taipei, there are many working opportunities for skilled or service sector workers, but, in the Taoyuan area, there are always operators; almost all employers looking for operators”
(Mrs. Ma).

In the following, as a result of industrial structural changes, the kinds of regional diversity of the employment barriers that have been emerging will be examined.

In urban areas

In urban areas, it appears that the majority of working opportunities are in the service sector; in other words, there were fewer jobs in manufacturing sectors. Unlike the other two areas, it seems that the decrease in manufacturing jobs has relatively less influence upon older people's employment in this area (Mrs. Chen 2, Mrs. Ke, Mrs. Ma and Mrs. Huang); for example, as Mrs. Huang said, older people in Taipei city were accustomed to working in the

service sector, in positions such as security guards in communities or at schools, as sales assistants in retail, or workers in catering and cleaning companies, and they often liked to apply for these jobs after becoming unemployed.

Additionally, a number of employment barriers for older job-seekers living in this area have been recognised. First, as mentioned above, employers' ageism has become a crucial barrier in preventing older people to get these jobs. Second, it has been shown that their accessibility to these jobs have been further limited by the increasing numbers of unemployed as a consequence of an economic downturn (discussed below).

In manufacturing intensive areas

In the intensive manufacturing areas, it has been found that many of the older long term unemployed with industrial structural change (Mrs. Chiu).

"I was told that, maybe thirty years ago, you could see factories producing shoes everywhere in our area; however, there are no shoe factories here now" (Mrs. Lai).

In the last two decades, massive numbers of manufacturing jobs have vanished; even worse, Mr. Liu pointed out that improvement in production techniques have also reduced the number of jobs in the manufacturing sector and in particular limited the chances of older unemployed factory workers returning to similar work.

"The fundamental reason of older people's employment barriers is that their jobs in factories have been replaced by machines" (Mr. Liu).

Thus, although the numbers of jobs in the service sector had increased along with urbanisation, the increasing numbers of service sector jobs were much fewer than the numbers of manufacturing jobs lost in these areas (Mr. Chen in Taichung county). Most

crucially, as mentioned before, older unemployed usually prefer to work in similar jobs.

Those who aimed to return to manufacturing jobs usually encountered greater difficulties because, first, the decreasing numbers of traditional manufacturing jobs (Mrs. Wu, Miss Xie and Miss Liu) and, second, a lack of the skills required to participate in the high-tech manufacturing sector (Mrs. Lai, Mrs. Zhuang and Mrs. Ma, Mr. Bai).

“I told her... I don’t think she could find a job in clothes’ factories now; in fact, most of them were closed down or had moved to Mainland China or Vietnam” (Miss Xie).

“you know... their working procedure is always changing depending on the type of products they are producing..... older operators are obviously disadvantaged with these new working procedures” (Mr. Bai).

In rural areas

Except for a few mountainous areas, working opportunities in many small cities or towns are officially defined as rural areas and mainly rely on the service sector, particularly retail.

Generally speaking, high percentages of rural residents were older people or dependent children, whereas younger people often worked in urban areas. Therefore, job-seekers in these areas were more likely to be low-educated or low-income and they were less likely to access high-paid or high-skilled jobs (Mrs. Lee, Ms. Lee and Mr. Lu).

Some employers in rural areas were more likely to welcome older job-seekers because they sometimes could not find enough younger workers to fill job vacancies (Mrs. Kuo); for instance, according to Mrs. Zhuang,

“in these supermarkets, I would say, only a few jobs which do not attract younger workers will be open to older job-seekers; therefore, the number of job vacancies were far from enough for them” (Mrs. Zhuang)

However, many jobs in the primary sector came from small or family businesses, as Miss Tsai pointed out:

“In Si-Ro [a small town], I can find some opportunities for work here for my older clients because this town is basically a very big fruit and vegetable farm market; most of businesses are family-run and are passed down from generation to generation”.

Thus, opportunities in these areas are usually less obvious. In this case, older people living in these areas might have to seek work through their social network; according to Miss Lee, ‘older jobs-seekers were less likely to access these jobs unless they had relatives or friends working for the business’ (Miss Lee in Chiayi county).

6.2 Closed down of family and small companies

Many local small or family businesses went out of business by the end of twentieth century. Apart from traditional factories (which moved to other countries or went bankrupt), many local shops started to shut down and were replaced by a number of large retailers or and chains of 24-hour convenience stores (Mrs. Lin and Mrs. Wu, Ms. Tsai).

“I remember... it was a nightmare... from the end of 2000... every week... there were hundreds of people being made redundant from the small companies, which were going bankrupt, and they were crowded in our station applying for job-seeking allowances.....”
(Mrs. Ma)

The sharply decreasing numbers of jobs in small enterprises has given older unemployed job-seekers specific difficulties in returning to this labour market. Mr. Liu described some of his older clients' dilemmas after losing their jobs in small enterprises:

“they might not complain their boss’ decision making..... their working relationships were more like friends actually, but they indeed worry that they do not know how to obey the rules and work with younger people in big companies”.

Indeed, job-seekers who had devoted themselves to working in small enterprises for many years, they are more likely to have issues related to understanding of the current labour market and the importance of social networks (see 5.15), as well as have considerably fear to participate in an entirely new larger company (Mrs. Lai, Ms. Chen and Mr. Bai). Although it is noted that some older job-seekers had successfully turned to work as cleaners in large supermarkets, it is still recognised that ageism issues had reduced their employment to work as service workers (Miss Tsai, Miss Chen 1 and Miss Ke).

Overall, coupled with the fact that the reduction of job vacancies in both factories and small enterprises are considerably large, As Mrs. Zhuang suggested, the decrease in the opportunities for work for older people meant it was not practical to allow these job-seekers to re-enter this labour market.

6.3 Emphasis on high industrial technique (IT) manufactures

As a consequence of government encouragement, some abandoned traditional factories have been converted as high-tech factories. The most successful case is in Hsinchu County and Taichung County in recent years. Meanwhile, the Taiwanese government also

generously subsidises some traditional manufacturing enterprises to become involved in high-tech manufacturing production chains, such as in Taoyuan or Tainan counties.

As participants who work in these areas indicated, in these high-tech companies, older people have been significantly excluded from this industry by competition from younger workers and ageism on the part of employers.

'if there is younger candidate also applying for the same job at the high-tech companies, my older client will not have any chance' (Mrs. Ke).

First of all, because of pay and benefits of any vacancies in this industry are generally higher, so many younger workers aim at apply for low-skilled or elementary jobs which used to be more open to older workers (Miss Xie, Mr. Lu, Mrs. Chen 1, Mrs. Chen 3, Mrs. Chiu, Mrs. Lee and Mrs. Wu).

Consequently, as the above participants stated, older job-seekers usually have limited possibilities to enter these companies: 'employers would never think about recruiting older workers while they already have many younger people who want to work for them' (Mr. Liu).

Secondly, employers might attempt to employ new younger employees (who are higher educated and have more specific skills) to replace their older employees, as Mrs. Wu said,

"some of my older clients have been fired by these companies because their managers thought that they were ineffective to cope with new production procedures and they want younger workers..... they know it is illegal, but they would rather choose to pay the fines".

Finally, it is noted that the prevalence of the high-tech manufacturing industry has probably reinforced the negative consequences of the issues with older people's skills (see 5.16).

Given that job vacancies in these manufacturing companies usually require more specific

professions, older people who were low-educated and had a restricted understandings of these professions normally do not have any chance of finding work with them (Mrs. Ma and Mr. Liu). For instance, as Mrs. Lin, Mrs. Chen and Mrs. Ma observed, older job-seekers were less likely to gain these jobs because they could not read or write English. By contrast, it seems that only the traditional factories might consider accepting older job-seekers (Miss Lee and Mrs. Lai).

6.4 Economic downturn and high unemployment rates

“As a result of the economic recession, employers did not care about social responsibility nor protect against disadvantages at all; they would prefer to use those who can bring more benefits to their companies” (Mrs. Kuo).

This above statement points to the fact that in an economic downturn employers are more concerned about their own profits and competitiveness rather than their social responsibility. In these circumstances, they might be reluctant to offer any job to disadvantaged workers.

Therefore, since 2000, it appears that fewer interview opportunities have been given to older job-seekers; instead, more manufacturing employers have wanted to recruit as many foreign workers (offering minimum incomes) as they can in order to lower their own productive costs (Mr. Bai and Mr. Wong). Meanwhile, they often expect that “one employee’s productivity could be increased by two or three times” (Miss Xie) or “one worker could work as two workers”.

As results of employers’ stereotypes, older workers are usually seen as low productive, expensive workers (see 5.22); thus, during an economic downturn, it is recognised that the

possibilities of older people finding work are considerably constrained (Mr. Liu, Mrs. Zhuang, Mrs. Chen 1, Mrs. Chen2 and Mrs. Ke).

Furthermore, the economic downturn has meant higher unemployment rates generally in Taiwan and it has made competition in the labour market more intense. As Mrs. Wong indicated,

“Few people wanted to work as low-paid cleaners in the past; but, recently, there are usually over twenty to thirty jobs-seekers competing for one cleaning job” (Mrs. Wong).

Mrs. Kuo had similar observation:

“it becomes much harder for my older clients to get jobs because many younger people have started to apply cleaners and security jobs, which used to be older people’s jobs” (Mrs. Kuo).

Under these circumstances, it has become more difficult for older people job-seeking because it is apparent that employers very often prefer to recruit younger job-seekers (again, they often have higher education and better English speaking and reading abilities) (Mrs. Wong, Mr. Bai and Mrs. Lin). For example, as Mr. Bai stated,

“when the unemployment rates were soaring, many younger or highly educated unemployed job-seekers who had higher financial stress usually turned to apply for low-skilled jobs, and you can imagine... there would not be many job vacancies left for low-skilled or low-educated, older job-seekers” (Mr. Bai).

In summary, from the above findings, it seems that the barriers to employment for older people have been obviously exacerbated by the economic context. First of all, it is observed

that the opportunities for older people in the service sector which has become the dominant sector in Taiwan are noticeably limited by the ageism of employer, as well as older job-seekers expectation of later jobs. Second, their chances of returning to work in other sectors, especially the manufacturing sector, or with small enterprises and family businesses, have been significantly narrowed with structural changes in the labour market. Third, their chances of applying for new jobs have also been limited as a consequence of the development of the high tech manufacturing industry; employers' consideration for their profits and competitiveness; employers' stereotypes of older workers; competition from younger workers; skills issues and a lack of understanding of the current labour market and social networking.

INFLUENCES OF RELEVANT SOCIAL POLICIES

According to the descriptions given by the case managers the pension scheme, job-seeking allowances and the anti-ageism regulations are associated with the barriers to employment for older Taiwanese.

6.5 Pension scheme

In Taiwan, how much state pension a pensioner receives is various and depends on their contribution rates, which are calculated from their actual income levels (BLI, 2009). When this survey was conducted, the new pension scheme (a monthly payment, with the amount of pension paid depending on the average overall annual contributions) had introduced for a few months, but it seemed that many older employees still prefer to stay in the old pension schemes (a lump sum payment, with amounts payments depending on the average rates of the last three years) (Mrs. Lai, Miss Lee and Mr. Bai).

The reluctance to participate in the new pension schemes were, first, although “living longer and gaining more payments” is highlighted by the Bureau of Labor Insurance as one of the new scheme’s advantages (BLI, 2009), many older job-seekers were sceptical of the government’s ability to pay them monthly payments until they die. As Ms. Lee indicated, “they generally thought that it was safer to have the lump sum payment rather than believing in the government’s promises” (similar observations were made by Mrs. Chen 3, Mrs. Ma and Mrs. Chiu).

Second, most importantly, some older job-seekers, especially those who were close to pensionable ages and had high incomes, might experience a significant reduction joining the

new pension scheme (Mrs. Lai and Mrs. Chen 3, Miss Wu, Mr. Wong and Mr. Liu). However, as a consequence of the desire to maintain pension payments, expectations of later jobs in terms of income were an employment difficulty. As Ms. Wu indicated, some of her older clients could not accept low pay jobs because of the reduction in pension payments in the future.

“I assumed that the average income of their potential jobs might be around NTD20,000 dollars, but their former contribution rates were often around NTD 30,000 to NTD 40,000 dollars; that is the problem” (Miss Wu).

Similarly, as Mrs. Lai and Mr. Liu argued, as a result of the poor design of older pension schemes, it is possible that older job-seekers might suffer in the huge decrease of pension payments.

“it is really unfair to him if he worked in a lower paying job, his lump sum pension payment will be reduced by about NTD 1 million or NTD 2 million” (Mrs. Lai).

Considering who were more often to encounter this issue, unsurprisingly, older job-seekers in Group 2 (who usually had higher incomes as a consequence of working in skilled jobs or more senior positions (see 5.4.7) more often encountered considerable difficulties in finding jobs that would allow them to remain at the same pension contributory rates (Ms. Chen, Mrs. Lin and Mrs. Wu, Mr. Lu). Except for older males and the highly educated, some older people living in manufacturing and urban areas were often trapped by this issue, as well. As Miss Xie and Mrs. Lai suggested, those who had worked in high-tech companies more often had higher pay and then paid very high contributory ratios to the pension scheme, so future

employment was often confined by these pension issues.

6.6 Job-seeking allowances

According to the Employment Insurance Law, those who are involuntarily unemployed can claim job-seeking allowances that pay 60% of the income of the claimant's last job as a financial subsidy during job-seeking periods. The longest period is six months and applicants need to provide two job-seeking approval documents every month (CLA, 2010). While talking about the effects of job-seeking allowances on older job-seekers' employment opportunities, a common idea underpinned by negative attitudes towards welfare dependency was found among participants. Some participants claimed that the provision of a job-seeking allowance had reduced the motivation to seek work among some older clients during these six months; it is noted that the older job-seekers consider this allowance as money they deserve and are therefore reluctant to actively seek their jobs until full claim of this allowance (Mr. Liu, Mrs. Chen 1, Mrs. Chen 3).

“they normally thought that they ‘waste’ their deserved benefits if they return to work earlier, which would make them lose the entitlement to the rest of the job-seeking allowance” (Mr. Lu).

According to Mr. Bai, it is quite difficult to persuade new older jobseekers to actually think about their later employment plans. Miss Lee suggested that Group 2 older unemployed (particularly those who were in high paid jobs) are more likely to have this attitude because the payment of this allowance is usually higher than other subgroups. As Mrs. Lin stated, “they were usually very happy that they could use job-seeking allowances to fund their

'holidays' after having worked for so many years"; but, in the fourth or fifth months, they would become very anxious because they would realise that "it is not a holiday at all; I am unemployed and cannot not find a job".

By contrast, some participants indicated that a number of older people in Group 1 who carried higher financial stresses and were working poor families appeared to have a more active attitude towards job-seeking, but could not return to employment soon; in this case, they suggested that job-seeking allowances should be longer than 6 months (Mr. Chen and Miss Xie); as Mrs. Ma stated,

"some disadvantaged older job-seekers indeed need more financial support or job-seeking allowances for a longer period; it is more difficult for them to return to work".

However, despite the underlying sceptical attitudes of welfare dependency, in fact, it is indicated that the design of the job-seeking allowance indeed has produced a dilemma for the older applicants who hesitate in their job-seeking. According to the Employment Insurance Law, if these applicants find work, they are unable to apply for this allowance again until they are once more involuntarily unemployed. This means that they are unable to claim for the remaining months of job-seeking allowance (Ms. Tsai, Mrs. Ke and Mr. Chen).

"after having a new job, their entitlement to job-seeking allowances will be entirely terminated. Some of my older clients are worried that..... if they are unsatisfied with their new jobs and then quit their jobs... in that situation, they cannot apply for any subsidy from us" (Ms. Tsai).

6.7 The anti-ageism regulation

“Although it is forbidden to use ‘age’ as a criterion to select employees..... he was told several times that ‘you are almost aged 65 so we cannot use you’” (Mrs. Chen 2)

In terms of the effects of the anti-ageism regulation, a number of participants argued that they did not consider this regulation as actually preventing older job-seekers from age discrimination (Mr. Bai, Lu; Mrs. Lai, Mrs. Zhuang, Mrs. Kuo, Mrs. Ke and Mrs. Chiu).

In fact, it appears that employers liked to use vague reasons to reject older job-seekers; as Mrs. Wu said, it is hard to prove that employers have acted against this regulation, because they could use health and physical condition as reasons to refuse them.

“he said to me, I really wasted my time, because they gave me the same feeling that they would not want any older employee but they just could not say it straightforward” (Ms. Lee).

Mrs. Ke said that the effectiveness of the anti-ageism regulation is limited and that “except for asking employers to take moral and social responsibility, I really do not know how to push employers to recruit my older clients’.

In short, there were a number of issues in relation to social policies. First of all, the design of pension payments and job-seeking allowances might cause difficult situations and mean that older job-seekers may be difficult in deciding how to return to work without risking the loss of their pensions or benefits. The effects of job-seeking allowances are debateable; on the one hand, it might reduce the willingness of older Taiwanese job-seekers to actively seek jobs at the beginning period of their application; on the other hand, it is also suggested that, for older job-seekers in Group 1, they might need longer financial support because it might

be hard for them to return to work within six months. Meanwhile, it is recognised that the anti-ageism regulations do not appear to have been effective in protecting older people from ageism.

SOCIAL CONTEXTS AND THE MEANINGS OF EMPLOYMENT FOR OLDER

TAIWANESE

The following answers the questions ‘how do social contexts shape barriers to employment for older people?’ and ‘how is the meaning of employment in old age constructed in social contexts?’ As literature suggest, older people’s role in family (as a dependent or supporter) is debateable and it is assumed that their family roles might relate to their motivation to work. Thus, analysis of the financial roles of older Taiwanese in the family will focus on the analysis of a government report. Second, how the two selected factors, gender and marital status, shape the meanings of employment in old age within the Taiwanese social context will be looked at. Finally, the reasons of further employment limitations among older male and female job-seekers will be discussed.

6.8 The financial support and responsibility in families of older Taiwanese

As the literature suggests (see chapter 2), financial security and support has been as one of the most significant factors in relation to the continuity of older people’s employment.

Moreover, in Taiwan and other East Asian countries, family support is consistently seen as the main source to secure older people’s well-beings as a result of governments focussing on policies that that promote economic growth and competitiveness. However, by contrast, it is warned that the family’s capacity and willingness to support their elders is likely to be weakened along with changing family structure.

Thus, it is crucial to explore the family support of older Taiwanese and responsibilities in current society. In this section, the distribution of older people’s financial support and

financially responsibilities will be examined by re-analysing the data from *Living Conditions of Middle-aged and Older People in Taiwan* (DGBAS, 2008; the same was used in chapter 4). Given that the used dataset is a national survey, the following analysis has provided a general picture of how older Taiwanese are supported by or receive support from their families.

Receiving support from family

Among those aged 45 and over, having either a stable income or family support was very important for financial security. The data shows that paid employment (39%), and family support (36%), could be seen as the two main sources that support older people, so fewer older Taiwanese solely depend on public provision (5%).

Moreover, those subgroups who were more likely to exit earlier from work (mainly in Group 1), as identified in 5.3, their family support seemed to play a more important role. For instance, the data shows that those aged 65 and over (49%); women (55%); and the lowly educated subgroups (46%) were used to heavily relying on their family, compared with 27% of those aged 45-54, 17% of men and 21% of the middle/highly educated. By contrast, the percentages of those mainly relying on paid employment were significantly higher among those subgroups who had high employment rates (mainly in Group 2): 53% of males aged 45 and over mainly relied on paid employment, compared with 25% of women; 50% of those aged under 55 and 35% of those aged 55 and over; 54% of the middle/highly educated; and 29% of the low educated.

Regarding the major financial sources among the unemployed or economically inactive, the importance of support from family members climbs to 47% of unemployed relying on family

support, whereas 44% relied on personal savings, and only 1% on public provision. Two thirds of the economically inactive depend on family's support, compared with only 16% on savings and 8% on public provision.

In short, the family's financial support can be seen as an important financial source for older Taiwanese, especially among those who are in Group 1, unemployed or economically inactive. Moreover, there might be a close relationship between employment rates of older people and the degree to which older people rely on the support of their families; the subgroups in Group 1 (who commonly had low employment rates) often had a higher percentage relying on their family's financial support, including older women; those aged 55 and over; and the low educated. By contrast, older people in Group 2 (who had higher employment rates) mostly lived from paid employment, including older men; those aged 45-54; and the middle/highly educated.

Giving support to families

In terms of family financial responsibility, the data again shows that 75% of older Taiwanese aged over 45 had to pay for their children's living costs; 48% for parents'/ parents-in-law; and 5% for grand-children or grand-parents. Within two genders, the proportion of older men financially supporting children and parents/parents-in-law was obviously higher than for women; but, interestingly, the percentage of women who were responsible for providing for the living costs of grand-children was double than for men.

This shows that as older Taiwanese age, the less likelihood they have to financially support their children or parents, but the higher the possibility that they have to support their grand-children financially, from 3% for those aged 45-49, to 62%, for those aged over 65. Thus, the

above findings seem to suggest that the majority of those aged 45 not only have to support their children or parents, but also they may also have financial responsibility for their grand-children – the “sandwich generation” mentioned in Chapter 5.

Furthermore, it is noticeable that, even though some older women and old-older (aged 55+) Taiwanese (who usually had lower employment rates and a higher possibility of relying on their family) might also be responsible for their grand-children’s living costs. Therefore, it seems that paid employment among some old-older or women (who are usually seen as economic dependents from the traditional point of view) might not be always seen as a secondary source but as a primary source of support.

The distribution of family financial support and how this responsibility influences the motivation to work for older Taiwanese and shape the meanings of employment in older age will be further discussed using the points of views case managers below.

6.9 Controversial perceptions of the meanings of employment

According to the observations of participants, the perceptions towards the meanings of employment for older people are controversial. The public, employers and even service deliverers appear to have passive attitudes towards the employment of older Taiwanese. By contrast, for the older people themselves, the meanings of employment are sometimes linked to their sense of personal worth.

Undervaluation of older people’s employment by the public and employers

‘you could tell from the regulation..... those aged more than 65 are automatically counted as economically inactive; basically, older people are defined as a non-labour force’ (Ms. Lee).

Public and employer attitudes towards the meaning of older people's employment more likely lean to traditional perspectives, which see older people as financially dependent on families and undervalue the necessity of older people's employment (Mr. Liu and Wong, Mrs. Lai and Mrs. Chiu, Miss Tsai). Mr. Wong described how the public devalues older people's employment in a collective way by saying,

"I think Taiwanese society is very disrespectful towards older workers; they are very negative; being old is equal to being useless, having little ability to work and out-of-date skills.....There is a collective belief that they are not suitable to continue working and, instead, they emphasise younger workers' opportunities..... have not they thought that we are all getting old?"

Mrs. Ke also argued that not valuing the employment of older people lies in cultural prejudices.

"why are many older people allowed to work in supermarkets in other countries? It is suitable for their physical condition, isn't it? Why do they never offer these jobs to them? It is a cultural thing, our culture does not think that older people need to work, nor want to work, in a supermarket..... that is the difference" (Mrs. Ke).

Given that the collective idea for older people's employment has constructed a negative tone towards older job-seekers, Miss Tsai suggested

"the public ideas of labour participation in old age must be modified; we need to establish a new belief and think about working in a meaningful way for everybody at different ages".

In reality, stereotypes underpinned by traditional views have been found through the

participants' working experiences; first of all, it is assumed that older people should not work because their families are supposed to take care of them; as the participants described, some Taiwanese employers have said that, "as long as you are old, you should stay at home; let your young family fight for your well-beings" (Mr. Lai), "you are old, it is your turn to take a rest" (Ms. Tsai).

Subsequently, second, older job-seekers' working opportunities are limited, as Mr. Liu stated: "they thought that only the younger need to raise their kids..... so that they like to give work to those who are younger". Moreover, their right to work has been confused with the increasing numbers of the unemployed: as Mrs. Lin observed, the Taiwanese public generally believe that "old workers will exclude younger workers from work opportunities if they do not want to retire early." Mrs. Chiu found "this belief has been emerging again in recent years..... with rising unemployment rates... leaving working opportunities for younger job-seekers."

Ignorance among the service deliverers

With respect to attitudes among service deliverers, including the case managers themselves, it is surprising that the significance of older people's employment has been underestimated, as well. In practice, it is admitted that younger job-seekers' and other demands of the young disadvantaged have been prioritised by service providers within the PESS (Mrs. Chen 1, Mrs. Zuang, and Mrs. Kuo, Ms. Lee, Mr. Wong).

As Mrs. Chen 1 stated

“to be honest to you, I rarely think about older job-seekers are supposed to be my prior target... I even did not sense that they need more assistance..... I often paid more attention to offenders, unfortunate women..... I have to admit that I had indeed ignored their demands...”.

Mrs. Chen 1 further indicated that the ignorance of the importance of older workers' employment is probably widespread:

“it is not only me, but also this society and the whole of the PESS, we always care more about other disadvantaged groups, such as the aboriginals, the disabled, women who are the sole breadwinners”.

Reflecting on policy implementation, the pressures of working performances which have produced a 'cherry picking' effect can be seen as the cause of ignorance of the demands of older job-seekers; as some participants stated, because of the requirement of performances by managers, frontline workers sometimes are forced to choose those for whom it is easier to find a job as priority targets (Mrs. Huang, Miss Chen, Miss Wu and Mr. Chen).

“our jobs are usually overloaded and we have stress from monthly performance targets... it is always a struggle to get the balance between our demands and those of our clients ...however, we still need to tell ourselves to be sensitive to older clients' needs” (Miss Wu).

However, some participants argued that it is true that some of their older clients had lower motivation to work. As Mrs. Huang indicated, “actually, I met some older clients and they did

not really want to work, they just want to apply for the job-seeking allowances for the entire six months". Also, they sometimes felt that their older clients had more interest in applying for the relevant allowances for unemployed workers rather than returning to work: "they would like to apply various allowances and join different training or contemporary public employment programmes by turns....." (Mr. Bai); Mrs. Lai said, "they thought that is their right to apply for every single allowance".

Overall, by asking how to avoid ignorance of older job-seekers' needs by the public employment systems, it was suggested that establishing specific programmes for older people would be helpful (Mr. Wong, Mrs. Zhuang, Mrs. Lee, Mrs. Chen 1 and Mrs. Lin). According to Mrs. Chuang,

"most of the special programmes or employers' subsidies are accessible to every kind of disadvantaged clients, we are used to offer these to my younger job-seekers..... we just simply think that it might be more useful for younger ones" (Mrs. Zhuang).

However, it is warned that the effectiveness of an 'older people's special employment programme' would still be very limited "unless the whole of society is fully aware that older people's employment is an important and stop the undervaluing of their employment ability" (Mr. Wong).

Desire to remain in work among older people

With regard to the meaning of older people's employment from the perspective of older Taiwanese, it remains controversial, too. On the one hand, some older Taiwanese are encouraged by their families to withdraw from work after becoming unemployed. As Miss

Lee said,

“if this family allow their unemployed older members not to work... staying jobless is fine for them” (Ms. Lee).

Being asked what ‘allow’ might mean, Miss Lee further explained that

“their families will not criticise them for being jobless and accept the fact that they are unemployed” (Ms. Lee).

In reality, whether to retire early or not might closely depend on the family’s overall financial conditions and family relationships, such as the family’s perceptions of older job-seekers’ unemployed status and practices of filial piety in different families (Mrs. Chen 2, Chen 3, Mrs. Lai and Mrs. Kuo, Miss Lee and Miss Tsai, Mr. Wong). Moreover, it seems that older women were more possibly to be ‘allowed’ to withdraw from paid work (discuss below).

On the other hand, however, employment is still mostly seen as a very crucial activity for older Taiwanese (many of those who preferred to apply for the full six-month job-seeking allowance would actively seek their work afterwards). This is more certain when responsibility and personal worth older Taiwanese feel within the family are taken into account (Mr. Liu and Chen, Mrs. Chen 1, Mrs. Chen 2, Mrs. Wong, Mrs. Huang, Mrs. Lee, Mrs. Lai and Mrs. Ma).

In general, the concept of “being a useful person” through having a stable working income is constantly mentioned to describe these older clients’ eagerness in finding employment. This perception is common among the majority of older job-seekers, regardless of older people’s

income levels, living areas, education levels and age, but it seems to be more prevalent in older men (Mrs. Chen 1, Mrs. Lee, Mrs. Lai, Mrs. Chen 2, Mrs. Wong, Mrs. Ke, and Mrs. Chiu, Mr. Wong, Mr. Liu and Mr. Chen). For example, Mr. Liu has an older client whose “definition of being a useful man as having a job, having an income, and I can use these to exchange something... like ‘respect’”.

“He felt too lost after being unemployed..... even though his family did not really need his income..... now, he said that he has become a useful man after getting another job” (Mrs. Chen 1).

By asking who might have ‘being a useful person’ in mind and attach their social status with their employment situations, it seems that the older job-seekers in Group 2 were more likely to do so; in addition, those who were carrying a heavier financial stresses were also more likely to emphasise their later employment (Miss Wu, Miss Xie, and Miss Chen; Mrs. Ke, Mrs. Chen 1 and Mrs. Chen 2). As Mrs. Ke stated,

“the highly educated or managers often have a greater willingness to work because they do not want the others to humiliate them; but, the low educated or those on low pay are often more concerned about their families’ financial stresses, and are keen to work so as not to become a burden to their families” (Mrs. Ke).

Therefore, it seems that employment status is used as a manner to gain position in Taiwanese society,

“older people emphasised their employment condition very much..... they believed that others would use this as the main criterion to judge their status in society and the family”
(Mrs. Lee)

In other words, employment could provide them with dignity in life and avoid seeing themselves as a shameful burden within their families.

“Having income, and then having dignity... He was an employer... wore suits... and had been well-paid, so he is very frustrated after being unemployed, he said ‘he did not want to rely on his children but earn for his and his wife’” (Ms. Lee).

As mentioned above, it seems that the perceptions of older Taiwanese of their employment and working motivation are likely be differenced by different marital status and gender. In the following, different attitudes towards their later employment will be discussed by these two factors.

6.10 Meanings of older people’s employment by marital status

It is observed that older people’s marital status appeared apparent impacts upon shaping the meanings of their later employment (Mrs. Zhuang, Mrs. Lai, Mrs. Chen 2 and Mrs. Huang, Miss Wu and Mr. Wong). As Ms. Chen pointed out, older Taiwanese job-seekers’ financial responsibility and pressures are probably determined by their marital status; therefore, the degree of their desires to return to work might be positively associated with their families’ responsibility and expectations.

“Married clients or clients who need to support their families have more responsibility, which often comes from either their partners or children. On the other hand, clients who are single will not have these concerns and they will be more flexible.” (Ms. Chen)

For instance, among those who were single (never married, have no children), they are less likely to fix their personal values with their employment status and their motivation to work might not be as strong as those who are married or have children (Miss Wu and Mrs. Wu and Mrs. Wong).

“the single job-seekers...especially in old age, they are easily satisfied by their work status..... they have food to eat... not being hungry is good enough” (Mrs. Wong).

Moreover, some single older job-seekers often had less motivation if they have assistance from other families, normally parents or brothers/sisters (Mrs. Lai).

With regard to divorced or widowed older job-seekers, such as lone mothers, they often have to carry all of the family responsibility by themselves and usually have stronger willingness to work after becoming unemployed.

“some older female job-seekers, they have independent children who are usually students, some are single mothers.....they would do any kind of harsh jobs in order to raise their children” (Mr. Lu).

In addition, it is found that older lone mothers are less likely to attach a sense of personal worth to their employment; instead, their eagerness to cope with their financial issues can be seen as the major drive to push them to return to work; meanwhile, they are more likely to be concerned with practical issues, such as how to manage their working hours and

finances, as well as their caring responsibilities (Mrs. Kuo, Mrs. Chen 2 and Mrs. Lee) (see 6.4.5-6).

The majority of older job-seekers are married or have partners, and their interpretation of the meaning of employment is as same as the descriptions above in 6.9 (a desire to remain in work among older people). Briefly speaking, the finding shows that married older Taiwanese are willing to return to work is likely to be stronger than the single unemployed. But it was also found that the interpretations of meanings of employment among married older Taiwanese exist most obviously with gender differences. This is discussed next.

6.11 Meanings of older people's employment by gender

As was mentioned above, older males are more likely to use their employment condition to represent their personal values.

“the meaning of having a job for an older male.....is almost equal to his personal values and social position” (Mrs. Wong)

Furthermore, as many participants found, it appears that the main breadwinners, normally married older men, were more likely to expect themselves to be ‘a useful man’ and linked their personal values with their employment condition; by contrast, among the married older women, they were usually responsible for caring and less likely linked their ‘usefulness’ with their employment status (Mr. Chen and Liu, Mrs. Chen 1, Mrs. Lin, Mrs. Ke, Mrs. Wu and Mrs. Ma, Miss Lee).

“women did not have to work outside, what they are actually doing mainly depends on what offers the largest benefit to their families..... even staying at home to care for the family; by contrast, men cared more about their work positions in relation to social status” (Mrs. Wu)

Under these circumstances, compared with older female job-seekers, it is noticeable that older males were usually suffered more from stress after becoming unemployed and anticipated finding similar work, hence their later employment is more likely to be constrained by their expectations of later jobs (see 5.21).

“he was low-confidence and is desperate..... he really wanted to go back to work soon..... his partner, parents and parents-in-laws create huge pressures on him..... they all think that he did not try hard enough to find a job” (Mrs. Wu).

The perceptions of hopelessness and self-doubts which result in failing to gain their expected jobs (such as similar positions, pay or working environment) might lead older male job-seekers to “totally mess up their later life” (Miss Lee) (similar observations were made by Mrs. Chen 3, Mrs. Lee, Mr. Wong, Mr. Lu and Mr. Liu). Above all, older males were more likely to identify their social status and family roles through their employment status, and it is reasonable to say that being unable to re-engage in the labour market might reinforce one of their employment barriers, older workers’ misjudgement of themselves (see 5.22).

Considering the reasons which cause this significant gender difference towards the meaning of employment in later life, a number of important determinants have been observed, including gender stereotypes in society and family attitudes,

Gender model in society

Results show that the gender stereotypes, 'males work outside, females work inside', are deeply rooted in Taiwanese culture and determine attitudes towards their working life (Mr. Chen and Mr. Bai, Miss Xie, Mrs. Ma, Mrs. Lai, Mrs. Chiu, and Mrs. Lee). In the light of this gender model, more sense of family duty, expectations and pressures are put on the shoulders of men rather than women.

"in his families' eyes, he is always the father, the supporter... his family rarely perceives that he is getting older... he is no longer an employee who corresponds to the mainstream's demands... thus, older male jobseekers are usually lonely and worried" (Ms. Lee).

By contrast, the employment and income of older women are often considered to be a supplementary source in families. For example, as Mrs. Lee observed,

"truly... a woman's income is usually seen as an additional income source; just a supportive, not an essential sources....." (Mrs. Lee)

Similarly, a young female participant (who just gave birth to a baby 2 months before the interview) strongly appreciates this gender model and said:

"I think women are more suitable for staying at home and caring for babies.....it is not only because of gender, it is also as results of different characteristics in men and women... when I hold my baby in arms, I just believe that women are destined to care their families and take it as their priority" (Mrs. Ma)

Family attitudes

It seems that family attitudes more often push older male clients backing into paid work (Mrs. Lin, Mrs. Zhuang, Mrs. Ke, and Mrs. Huang, Miss Wu, Mr. Lu), but pull older females to remain unemployed or turn to do domestic work (Mr. Chen, Mr. Lu and Mr. Liu, Mrs. Lee, Mrs. Chen 3 and Mrs. Ma).

*“It is unacceptable for older men themselves to stay at home and not to work in formal jobs”
(Mr. Wong).*

“When an older man remains unemployed, he usually feels strongly shameful. Because he thinks that he cannot rely on his family without any [financial] contribution” (Mr. Lu)

Instead, regarding family attitudes towards unemployed older women, “doing domestic work” might be a reasonable alternative. As Mrs. Chen 3 described, one of her older female client’s family appeared to have a very positive attitude towards her unemployment;

“Her children think it is beneficial for her family because she can stay at home and pay more attention to them. They feel she was always too busy to look after them when she worked outside...for example, in the past, their grandmother always had to play her role” (Mrs. Chen 3).

Consequently, as Ms. Lee observed, many of her older female clients eventually told her that they did not want to work again after being persuaded by their children.

“in some cases with older women, when they told their families that they had difficulty finding work, their families would not like them to seek work or use any possible reasons to

*persuade them to withdraw from work, and say to them 'mummy, I can support you'.....
and they will not work again" (Miss Lee).*

In short, the above demonstrates that there exist significant gender differences in the meanings of employment, views on family responsibility as well as family attitudes towards unemployed older Taiwanese, as a result of gender stereotypes in Taiwan. In contrast to unemployed older women whose incomes are often secondary sources in families and might allow them to stay at home, older men might have more stress after becoming unemployed, because having an work has been used to demonstrate their personal values and gives them a sense of dignity in society. Therefore, it is likely that older men might have a stronger desire to re-engage in their work if taking the impacts of family responsibility and family attitudes into account. By contrast, older women are possibly more likely to withdraw from work with family support. The following will explore how these gender differences limit the possibilities of returning to work for older men and women, respectively.

LIMITATIONS ON THE POSSIBILITY OF EMPLOYMENT IN RELATION TO SOCIAL CONTEXTS

6.12 Low possibility of returning to work among older females

By asking the participants who are more likely to return to work by gender, the answer seemed to coincide with the 'males work outside, females work inside' rationale; older men are more often able to find a job because they have an active attitude and a strong desire to continue their working life, whereas older women often have a less active job-seeking enthusiasm and are more concerned about their families' circumstances (Miss Wu, Mr. Lu, Mrs. Lin, Mrs. Zhuang, Mrs. Ke and Mrs. Huang). The care responsibilities of older women, as well as employers' stereotypes, means they have less possibility of returning to employment (assuming that older women are unable to fully devote themselves to work because of care responsibilities - see 5.18).

However, it is likely that the key issue for the low possibility of returning to work among older women likely lies in the relatively lower motivation to work (Mrs. Zhuang, Mrs. Kuo and Mrs. Wong, Mr. Lu and Mr. Bai).

"older women are less enthusiastic about their later jobs... that is our culture...if their husbands can earn for them..... and if they cannot find their expected jobs after awhile, they might withdraw from work directly" (Mrs. Zhuang).

Precisely speaking, it hints that the social context, the gender model and family roles have all created a social atmosphere to lessen the willingness of some older women and their probability of returning to paid work.

“older women usually have less pressure from families, their partners usually have work... if they do not work, staying at home as a housewife is another welcome option, therefore, they are not as active in job-seeking and are more difficult to help, honestly...” (Mr. Lu).

6.13 Low possibility of returning to work among older males

Although it is recognised above that older women might have a low possibility and motivation to return to work, it is also highlighted that older women who really want to work are more likely to find a job because they are often more flexible in terms of selection of later jobs. By contrast, many the probability of returning to work form older men is considerably constrained by inflexibility and self-esteem issues as a result of their sense of personal of value and their employment conditions (Mr. Chen, Miss Tsai, Mrs. Chen 2, Mrs. Zhuang and Mrs. Wu). Moreover, the above participants also found that older job-seekers who were middle/high-educated or working in senior positions also have similar situations (Mrs. Lin, Chen 1, Mrs. Lee and Mrs. Huang, Mr. Liu, Miss Wu) (This finding is parallels **5.21**).

Indeed, it is commonly noticed that older women are more likely to adapt to the fact that they might have to work for lower pay, in lower positions, or in very different sectors (Miss Tsai, Mr. Chen, Mrs. Chen 2, Mrs. Zhuang, Mrs. Kuo and Mrs. Wu).

“... if we explain to [older women] why they have to adjust their expectations of later jobs in this labour market... maybe after three or four times, they will accept and change their thoughts, but, older men always take a much longer time to go through this process” (Mrs. Wu).

By contrast, unemployed older men are more likely to stay unemployed long term, due to

insistent expectations of later jobs; as Mrs. Wu observed,

“male jobseekers often need a longer time to ‘accept’ the fact that their expectations of later jobs are less likely to be achieved in reality, no matter how long they are going to wait and seek...” (Mrs. Wu).

Some participants indicated that these differences might relate to their natural personalities:

“women are used to being more flexible” (Mrs. Chen 2), “females are more capable to cope with their trauma or losing their last jobs..... males insist to find again exactly the same positions” (Miss Lee). Moreover, some participants consider that gender differences in relation to family roles or ways of establishing personal values might be a fundamental cause (Mrs. Chen, Mrs. Lee, Mrs. Kuo and Mrs. Wu). As Mrs. Lee found, the income from women is a secondary financial resource for their families, so they do not worry very much about incomes levels in later jobs. Also, the status of older women in the family did not entirely rely on their employment position and income levels. As the above statement from Mrs Chen showed, “doing domestic work” is another well-accepted solution to settle their own position in their families.

By contrast, it seems that older male job-seekers are usually reluctant to accept jobs with lower pay or at lower positions, because of the link between employment conditions and sense of personal worth; according to Mr. Chen:

“if there is a job, NTD 18,000 monthly, older females will accept it without any doubt, but older males... would think ‘ I can find a NTD 20,000 job so I should not lower the value of my working ability now’” (Mr. Chen).

Mr. Chen also said that he himself also believes that “being a male, I should and I could have a job with higher pay... there is no reason to prevent me from doing so.” In Mr. Chen’s statement, he hints that the fundamental gender differences in the meanings of employment have a widespread impact.

Moreover, it seems that the traditional idea regarding social hierarchy also plays a role. As Miss Lee said: “males are usually the authority figures in families, and having a decent job is a straightforward way of demonstrating that.” Precisely speaking, “the head of a family” is frequently attached to some older male clients who have low flexibility of later jobs and a low possibility of returning to work (Miss Chen, Miss Wu, Miss Xie, Mrs. Lai).

In addition, the above participants also indicated that older male job-seekers who considered themselves to the head of their families might have benefits in having an active attitude towards job-seeking; but, as long as they realised that there are less likelihood of finding similar work as before, the self-esteem issue emerges as a hard-to-overcome employment obstacle. This self-esteem issue can be seen as one of original sources of the fear of losing face or the shameful feeling of doing certain jobs. Meanwhile, it is likely that whether they remained unemployed or accepted unexpected jobs (normally low-paid or service sector work), their self-confidence would be low as a consequence of self-doubts and devaluation. For example, it was indicated that some older men may consider their unemployment as a shameful personal failure.

“Due to male self-esteem...it is always very difficult for older men to tell others that they are unemployed. I once had called an older male client and his son answered the phone and

told me 'my daddy always goes to work every morning'... he had not told his son about his unemployment" (Miss Lee).

A number of participants noticed that some older men are more vulnerable to emotional difficulties while job-seeking along, with this consideration (Miss Lee and Miss Chen, Mrs. Chen 3 and Mrs. Huang). As Mrs. Huang pointed out, some "will become very frustrated and give up returning to the labour market".

"he is an important person in his family; after becoming unemployed, he was hopeless for his future and could not stand the judgement of his family" (Ms. Chen).

A male client (described by Mr. Liu) believed that his self-esteem would be seriously humiliated if he did "shameful" (low skilled) jobs. Additionally, sometimes, self-esteem issues might be reinforced by their partners' better employment condition. An older client (described by Miss Xie) had been in long term unemployment because

"his wife is a senior insurance saleswoman...performance and incomes are great... He felt that his [later] performance and working condition could not be less than his wife while searching jobs..." (Miss Xie).

As for perceptions of older women, it is noted that they are less likely to be trapped by self-esteem issues and more able to accept available working offers (Mrs. Chen 2, Mrs. Lee, Mrs. Wu and Mrs. Tsai, Mr. Chen). As Mr. Chen indicated, older female job-seekers usually adopt the 'work first' strategy and believe that having a job first is more realistic.

The above shows that the reasons which might limit the possibility of older Taiwanese returning to work appeared to be divided by gender, too. Older female job-seekers are more

likely to withdraw from work as a result of their roles in families (being seen as a carer and their incomes seen as a secondary source). By contrast, older male job-seekers who might have a higher motivation to return to work are often constrained by self-esteem issues and low flexibility based on their expectations.

6.14 In summary

The aim of this chapter was to examine the third theme, 'employment barriers to older Taiwanese workers and meanings in socio-economic contexts'. The above findings show that the opportunities for work for older Taiwanese have been significantly reduced by structural changes in the Taiwanese labour market. Older Taiwanese who were employed in manufacturing or by a small/family business were less possibly to find similar work. They might also encounter difficulties in applying for work in the service sector because of ageism and their own personal expectations of for the work they are looking for, or in the emerging high-tech companies, because of a lack of relevant skills and ageism.

Moreover, in terms of the impact of social policies interventions, it is found that the design of the new pension scheme might result in a reduction of pension payments which also limits the willingness of older Taiwanese job-seekers to return to work. It also seems that the job-seeking allowances and anti-ageism regulations have not produced any encouraging effects for the older unemployed.

With respect to how the social context constructs meanings of older Taiwanese's employment, it was found that, generally speaking, older Taiwanese have been regarded as a non-labour force and as a dependent within families by the public, including PESS service deliverers. Becoming dependent within a family indeed has happened in some cases; some unemployed older Taiwanese, mainly older women, might become economically inactive as long as their families can support them.

However, some older Taiwanese, especially men, might still have a heavy financial

responsibility. Some older men might consider having a stable income and position demonstrates their personal worth within the family. Moreover, unlike the older men who were still expected to be the main breadwinners, caring responsibilities usually played an important equivalent role in determining the future employment of older Taiwanese women.

Therefore, in terms of the employment limitations in relation to the Taiwanese social context, it was found to have produced different limiting effects for older men and women. For older women, consideration of family responsibility, employer stereotypes and family attitudes might decrease their motivation to work. By contrast, for older men, motivation might be higher, but because they tend to bear larger financial responsibilities and link work status to their status within families, their possibility of returning to work are likely constrained by self-esteem issues and inflexibility over the types of later jobs.

7 DISCUSSIONS AND CONCLUSIONS: TO WORK OR NOT TO WORK?

7.1 Introduction

This chapter discusses how the research questions outlined in Chapter 1 were answered in chapters 4 to 6 will be summarised. How the research findings refer to the literature or contribute new understanding will be highlighted. Meanwhile, a number of suggestions regarding policy implementation will be offered. Finally, suggestions for future research will be given at the end of this chapter.

In answering the central research question, I attempt to identify the public discourse which has impacts on older people's employment barriers and meanings. In other words, apart from the interaction between personal circumstances and socio-economic context, it is argued that public discourse regarding older people's employment, or the social attitudes of working in old age, has played a crucial role resulting in low labour participation rates in Taiwan. Therefore, one major contribution of this thesis is to demonstrate and highlight the importance of changing these social attitudes in Taiwan.

7.2 Summary of findings

7.2.1 Factors of employment for older Taiwanese

Chapter 4 presented factors that affected the possibility, conditions and circumstances of employment for older Taiwanese. These included age, gender, education, marital status, regions and occupations. Within the PESS, the proportion of successful job-seeking in some groups of unemployed older Taiwanese were higher, such as the young-older, women,

middle-educated, those living in rural and manufacturing areas or looking for low-skilled jobs (occupations).

With respect to the factors that affected employment condition of older Taiwanese (that is, whether employed, unemployed or economic inactive), occupation, education, gender, age and marital status all have significant impacts. First, some employed older Taiwanese, including the low educated, low skilled or manufacturing workers, were more likely to work in unfavoured part-time jobs and worry about employment stability. Second, some unemployed older Taiwanese suffered from low self-confidence, including women, old-older (aged 55+) or low educated; also, the low educated or men generally were more likely to expect to work in low-skilled or manufacturing jobs. Finally, among the economically inactive older population, older females were more likely to exit early from paid work (at 48) and, more specifically, those aged 55-64, low educated, widowed/ divorced or married/ cohabiting had a lower motivation to return to work.

7.2.2 Types of employment and barriers for older Taiwanese

Two types of older Taiwanese who shared similar employment problems had been described in chapter 4. The first cluster (Group 1) referred to those older people who have '**low employment rates and low incomes**', including those aged 55 and over, women and the low educated. The second cluster (Group 2) referred to those who have '**high employment rates but high unemployment rates**', including men; the middle and highly educated; those single or divorced; and those is living in urban or manufacturing areas.

Chapter 5 identified factors functioning as employment barriers for two types of the older Taiwanese by quantitative and qualitative methods. Regarding employed older workers, it

was shown that the reasons older Taiwanese in Group 1 worked for low pay were their low education qualifications, low positions, and working in the smallest enterprises or family business. As for the employed older Taiwanese in Group 2, it shows that they were more likely to change jobs at least once in their last year. 48% of the employed older workers had changed jobs involuntarily in 2007/8, for reasons such as 'shrinking working opportunities', 'ending of working contracts and unable to extend it', and 'poor pay'. But it shows that Group 2 were more likely to change jobs by 'changing working identity- from being employers to being employees', and, additionally, changed either from low-skilled jobs to service sector jobs (parallel) or from professional/skilled jobs to service sector jobs (downward)

According to secondary data analysis, the factors contributing to unemployment among the unemployed older Taiwanese were rather different between the Group 1 and 2. Among Group 1, they were more likely to be unemployed by the ending of short-term contracts, working in the manufacturing sector, or working in the smallest enterprises or family business. By contrast, although the employed older workers in Group 2 had a slightly higher likelihood of changing their jobs voluntarily, most also fell into unemployment involuntarily by shrinking of job vacancies (especially in larger enterprises or the manufacturing sector) or the shutting down of personal business.

Case managers attributed a number of factors that had produced obstacles to the employment of older Taiwanese in general, such as skills; time; cost of commuting; education qualification; expectations of later jobs. It shows that health and physical conditions; understanding of current labour market and social networks; and the

stereotypes about ageing also function as employment barriers. Generally speaking, the majority of older Taiwanese suffered from restricted opportunities to access their expected jobs (normally similar to their previous jobs) in terms of flexibility of working time/shift/environment, income levels, working position, occupation and location, and so forth.

Moreover, it is also evidenced by case managers that the Group 1 and 2 older Taiwanese had encountered similar employment barriers, for instance, ageing issues, skill issues, expectations of later jobs (about working hours/shifts/environment, income levels, position, occupations and locations and so forth) and employers' stereotypes. However, due to different personal circumstances, the employment barriers of the older Taiwanese workers within Group 1 and 2 were diverse.

Generally speaking, the employment barriers for Group 1 were more often ageing issues, health conditions, (low) education qualifications, (low) incomes (especially if taking costs of transportation into consideration), (low) mobility, (limited) social network, (out-of-date) working skills, (low) self-confidence, (passive) job-seeking attitudes and so on. Therefore, it is hard for them to return to work and compete with the younger job-seekers.

By contrast, the older Taiwanese in the Group 2 more often had worked in higher paid employment and more senior positions, as well as being highly educated, so that their social networks, physical strength, self-confidence, and potential pay for future work were normally better than Group 1. However, except for employers' stereotypes (e.g. being proud or hard to work with), it seems that having limited accessibility to their expected jobs

(regarding expected income, position, sector, locations, costs of transportation, personal professions) appeared to be obstacles to their possibility of returning to work.

7.2.3 Economic and social policy contexts and employment barriers

Chapter 6 focused on how socio-economic contexts construct the meanings of employment for older Taiwanese and shape their employment difficulties. The findings showed that, first, the employment opportunities of older Taiwanese have been remarkably limited by structural changes in the labour market (shrinking jobs in the manufacturing sector and small/family businesses alongside the requirement for new skills in high-tech companies) Moreover, being difficult or unwilling to find work in the service sector was also obstacle to their later re-employment. Second, it shows that the reduction of future pension payments and the ineffectiveness of job-seeking allowances and anti-ageism regulations have negative effects on the employment of older Taiwanese.

Third, case managers attributed the overall social atmosphere and service deliverers have devalued the importance of the employment of older Taiwanese to socio-cultural perspectives, increasing unemployment rates and considerations of work performances. Therefore, it is not easy for some active older Taiwanese job-seekers (normally older men or the main breadwinners, who carried a heavier financial responsibility) to regain their jobs in this society. Finally, in the light of gender patterns, where older women are often the main carers whereas older males are the main breadwinners, older women are more flexible about income levels, but their job-seeking is usually limited by their care responsibilities and employers' stereotypes. In contrast, the employment of older men is more likely to be constrained by their expectations of later jobs (e.g. pay) and self-esteem issues.

7.2.4 Social contexts and meanings of older Taiwanese's employment

With respect to the meanings of employment for older Taiwanese, in relation to social contexts, it was shown that they were controversial within different aspects. On the one hand, so far, resulting from filial and family traditions, it shows that older Taiwanese are fundamentally seen as economic dependents by the public and considered to be secondary clients within the PESS. Thus, some older Taiwanese appeared to have low motivation to work, such as women or those who had family support, and they were more likely to withdraw from paid-work or to make caring responsibilities a priority.

However, on the other hand, it was demonstrated that many older Taiwanese (the majority of older men) are not economic dependents but the main breadwinners in families, so that having a stable income were important to them. Moreover, they are more likely to attach a sense of personal worth to their employment, which motivates them to return to work. In this case, the meanings of their employment relate to their identities within family and society.

7.3 Implication for theoretical models and employment policy making

In literature review, it was suggested that the probability of employment for older workers or their decision to retire is likely to be associated with various factors, such as individual factors, employers, political and economic factors, and social-cultural factors. A number of research findings supported by the literature will be discussed; moreover, a few significant findings regarding the Taiwanese context will be highlighted.

7.3.1 Human capital, economic context and employment barriers

In terms of the models of human capital, employability and working ability, a number of observations regarding the relationship between human capital and employment barriers in the two older Taiwanese groups have been found.

The older Taiwanese in Group 1

Low employment rates and low incomes/ the 55+ age group, female and low educated

The findings suggest reasons which result in low pay among Group 1 is fundamentally associated with poor 'individual circumstances and ability' (see Hillage and Pollard, 1998; McQuaid and Lindsay, 2005; Ilmarinen, 2001). For example, low educational qualifications and work experiences (mainly in low paid or service sector jobs). Apart from individual circumstances, it seems that "job and organisational factors" (Wang and Shultz, 2010:182), enterprises and society issues (Ilmarinen, 2001) and social capital issues (Kawachi et al., 1997; Liukkonen et al., 2004; Putnam et al., 1993) were all obstacles.

It seems that the characteristics of the employment difficulties for this group are similar to the "survivors" and "Jugglers", proposed by McNair (2006:490). For example, the findings show that it is difficult for these low skilled or low paid older Taiwanese to return to work after becoming unemployed, as a result of employers' stereotypes of their working productivity, their limited social network, insufficient work skills, inactive job-seeking attitudes and lack of self-confidence. Similar situations have appeared in other Asian regions, too. As a result of restricted accessibility to "education, meaningful work, food and health" when younger ages, it is noted that, for instance, Thai women and old-old populations also

encountered more difficulties to remain in work due to a lack of education opportunities and poor health (Arifin, 2006:28).

These findings concur with the existing literature; as academics have observed, older people's human capital, as well as individual factors, indeed have remarkable effects in determining older people's employment, such as skills, education qualification, incomes, occupations and working experiences and so on (e.g. Hansson et al., 1997; Campbell, 1999; Smeaton and McKay, 2003; McNair, 2006). In this case, the underpinning logic of active ageing or active labour market strategies might be more or less applicable; that is, investing in older people's human capital could increase their chance to return to work regardless of the impact of socio-economic contexts (e.g. Taylor-Gooby, 2008; Kluge and Essen, 2006; Carcillo and Grubb, 2006; Maltby, 2011; Taylor, 2004; Ilmarinen, 2002).

However, if taking economic contexts into concerns, as Mayhew and Rijkers (2006: 154) argue, low-skilled/educated workers are more likely to be excluded from the mainstream as a result of "crowding-out" or "job queuing" effects during periods of economic downturn, when low-skilled or low educated job-seekers' opportunities for work will be excluded by the high skilled or high educated job-seekers willing to work in low pay or low skilled jobs). Indeed, according to the case managers interviewed, the economic downturn and ageism have made it harder to compete with unemployed younger job-seekers or to gain government attentions to tackle their employment difficulties.

Therefore, it seems that improving these older Taiwanese's working ability might not effectively cope with the fundamentally structural issues in this labour market. A similar scenario had been found in the West. As academics have argued, the ALPMs in Western

countries have little effect to “alter the economic prospects of the individuals” (Kluve and Schmidt, 2002:413), so that the long-term labour market programmes have less impact than short-term programmes (OECD, 2005).

The older Taiwanese in Group 2

High employment rates but also high unemployment rates, men, middle-high educated, single or divorced, and living in urban or manufacturing areas

In this group, having limited opportunities to find to their ideal jobs (usually in better working conditions), or, having higher expectations toward their later jobs, have become significant employment barrier. Consequently, they might need more time to find their ideal jobs, resulting in higher unemployment rates.

Compared with Group 1, older Taiwanese in this group often had better qualifications, incomes, skills or more senior positions (some even had been employers). The findings also show that the negative effects deriving from poor individual circumstances and working ability are less with this Group 2. Thus, it might be fair to describe them as the “choosers” (McNair, 2006:490) in this labour market.

However, it seems that some individual circumstances also appeared to have specific impacts to reduce their employment probability. For example, first, in terms of their considerations of losing face in accepting service sector or low-skilled jobs, or working lower positions, it seems that “needs and values” in work (individual attributes by Wang and Shultz, 2010:182) have become employment barriers.

Second, given that they often had a persistent expectation of later jobs, it is assumed that their “adaptability” in work (individual factors by McQuaid and Lindsay, 2005:209-10) could also be seen as crucial employment obstacles as well.

It is also noticeable that non-individual factors also play a role in reducing the chances of the older Taiwanese in this group to return to work. For instance, it appears that their employment is restricted by “job and organisational factors”, such as “job characteristics, job attitudes, age stereotypes at work and flexible job options” (Wang and Shultz, 2010:182), and enterprises’ problems, such as “tolerance for change, work organization, work environment” (Ilmarinen, 2001:634).

If taking the implementation of current Taiwanese social policies and economic context into consideration, it is reasonable to argue that the work-first approach within the PESS might not be effective for this group. For instance, the reduction of pension payments might have more negative effects on this group; in periods with high unemployment rates, it is more difficult for them to access their ideal jobs. Although it might be beneficial to improve their working skills in order to help them with their expected jobs, their opportunities to win jobs with high incomes or more senior position might be limited if taking the crowding effects into account. Thus, their employment barriers are unlikely to be moderated simply by directly job-matching or an investment in their work skills by training programmes within the PESS.

This observation might partly explain why the proportion of successful job-seeking by males, the highest educated, or those seeking for professional and skilled occupations, was consistently lower within the PESS (see Table 4.4). In short, apart from existing training

programmes or job-seeking allowances, it is essential to pay further attention to exploring the kinds of policy intervention that could be beneficial for these older job-seekers, otherwise it is hard to reduce the high unemployment rates for this group.

7.3.2 Social capital and employment barriers

The context of social capital is constructed by “obligations and expectations..... and norms accompanied by sanctions” (Coleman, 1988:S119). The social capital of older workers are likely to be underpinned, or constrained, by family function and ties, social networks, social relationships, as well as social attitudes in society (see Chapter 2). Moreover, under different political and economic considerations, government might shape public discourse to manipulate the meaning of older people’s employment (see Blaikie, 1999; Estes et al., 2003; Leppel and Clain, 1995 and Clark and et al., 1999)

Employment of older Taiwanese has been overwhelmingly constrained by their social capital. As findings show, regardless of opportunities, motivation or interpretation of meanings of employment, older workers have been undervalued by public beliefs in family obligations, gender stereotypes and social images of unemployed older workers.

For instance, as was demonstrated in 6.9, the meanings of older Taiwanese’s employment have been misjudged by the public and even service deliverers (which also resulted in ‘cherry-picking’ effects by the PESS). Also, as findings in 5.22 show, as a consequence of misjudgement by older job-seekers and stereotypes by employers, hopelessness, low self-confidence and self-doubt had led to failures in job-seeking for both groups of older Taiwanese.

Even worse, it is likely that the increasing unemployment rates alongside structural changes in this labour market might weaken the social capital of older Taiwanese and reinforce a number of prejudices older Taiwanese's working, within the social context. For example, it seems that the case managers' observations coincide with the findings from the literature, such as the early exit by older Taiwanese is seen as a way to "make room for younger workers" (see BEVT. 2008); allowing older family workers to remain in work is the 'children's failure' or a 'family's dysfunction' (see Keith et al., 1994:249; Fan, 2007:162-163; Raymo and Corman, 1999:226).

However, instead of considering the service deliverers' attitudes as a misjudgement, Wright (2003) argues that constraints and pressures derive from the working roles front-line workers, who might not "comply entirely with the formal goals and guidance documents of the Employment Service" (Wright, 2003:297). Therefore, if taking a street-level bureaucracy perspective into account, it is essential to explore the kinds of contexts or role conflicts that construct the mentioned attitudes.

Needless to say, further research is needed to explore how the above prejudice contributes to lower either an employer's willingness to recruit older people or an older person's social capital.

7.4 To work or not to work?

From the above, a number of insights regarding the employment circumstances, barriers and meanings of employment for older Taiwanese have been generated. As the literature suggests, an ageing culture might determine an older populations' collective working motivation. For example, driven by "non-financial commitments to employment" and believing in work as a social right, Norwegian and Swedish older people prefer to work in old age (Vroom, 2004; Hult and Edlund, 2008). Moreover, given that ageing culture is a complex phenomenon, as shown above in 2.2, it is assumed that recognising the kinds of social attitudes of older people's employment could help illuminate the ageing culture.

In this section, the centre of the overarching theme of this thesis, whether older people should work or not work, will be approached by mapping the social attitudes of Taiwanese towards older people's employment. Considering that the employment of older Taiwanese has been remarkably limited by their social capital, as shown above, the context of Taiwanese social attitudes towards older people's employment will go beyond the beliefs in social rights and include the individual considerations, government and family attitudes, as well as social welfare ideology.

7.4.1 'To work' social attitude

On the one hand, a 'to work' social attitude exists under a number of circumstances in Taiwan. First, if only taking individual financial stresses into consideration, the findings show that the higher the financial stress an older Taiwanese job-seeker has, the higher the possibility that they would return to work soon. As the findings in 5.19 show, many unemployed older Taiwanese who were successfully job-seeking commonly bear a heavier

financial responsibility in their family, whereas those having family's support were more likely to withdraw from work. This hints that those older Taiwanese on low incomes, or those who carry a heavier financial responsibility, might have a stronger demand to work in old age, although against this, it is recognised that the Taiwanese older workers on low incomes, in Group 1, appeared to have lower labour participation rates.

As the literature suggests, compared with the middle-aged populations, the older population often has to bear less care and financial responsibilities (e.g. Rudinger, 1976; Shore, 1998; Fingerman et al., 2004).

The practice of filial piety in Taiwanese society suggests that older Taiwanese might have less necessity to remain economically active (e.g. Liu et al.; 2003; Hsu, 1998; Fan, 2007).

However, this thesis has found that many older Taiwanese still carry financial responsibility, based on the observations of case managers and secondary data analysis. Also, it is evident that the majority of older Taiwanese still want to remain in work, particularly for those who still support their families rather than a dependent. In this case, it is presumably that there is a 'to work' social attitude among these older Taiwanese.

Second, it seems that the 'to-work' social attitude might be more obvious among older men. As findings show, older Taiwanese men were keener to continue their employment because they attached their personal worth within the family and social status with their employment. Therefore, they had not only to have jobs but also to seek ideal jobs with a suitable income, positions and so on; meanwhile, concerns of self-esteem had become either a drive or barrier to work in this group.

Consequently, it is fair to argue that the desire for employment by older Taiwanese should not be underestimated, because most of them were less likely to become entirely dependents on their families and some would like to demonstrate their personal worth through employment. Hence, it is suggested that the policy makers and service deliverers should bear in mind that work opportunities should be reasonably assigned to older job-seekers rather than assume younger jobs-seekers are a priority (such as by supposing that only younger seekers need to raise their families).

7.4.2 'Not to work' social attitude

However, on the other hand, it seems that there is a strong 'not to work' social attitude in Taiwan. A number of reasons for this situation are discussed below.

Public, government and family's attitudes

The combination of public, government (including the PESS), and family attitudes have constructed a discouraging environment for older Taiwanese looking for employment.

First, with regard to the public's attitudes, as Chapter 6 shows, it is notable that the Taiwanese public has not fully admitted that working in old age is an essential option for older Taiwanese; in contrast, it seems that the emphasis on the social rewards of older people still plays a role to constrict the employment of older Taiwanese (e.g. "you are old, it is your turn to take a rest," as observed by Miss Tsai). Also, it is observed that the Taiwanese public might believe that the early exit of older employees from the labour market could "make room for younger employees." In fact, it is argued that this belief was misled by the "lump of labour fallacy" (Shiller, 2003:285), which ignores the flexibility of the labour

market and supposes that reducing the aggregate labour force can increase or create vacancies for other unemployed (see Campbell, 1999; Sargeant, 2006). For instance, Sargeant (2006) disputed the logic of making room for younger workers by early retirement and indicated that it might simply become an excuse for employers to recruit younger employees to replace their older employees in the UK. Jousten et al. (2008:29) investigated the impact of early retirement in Belgium on the unemployment of younger people and concluded that there was not any causal link between them; instead, the overall economic condition was more important.

Moreover, second, it seems that the national fiscal stress in relation to the ageing Taiwanese population might not increase as severely as with Western nations. If taking the Taiwanese welfare ideologies into concerns, as the literature shows, the Taiwanese government's role in securing an older individual's well-being is often minimised and replaced by the family's role (Tu, 1996; Doling et al., 2005; Zhan et al., 2008). Indeed, whether unemployed or economically inactive, the statistics show that very few older Taiwanese rely on public funds but mostly on family support. For instance, less than 3% job-seekers claim public or employer unemployment benefits whereas 32% depend mainly on financial support from their family. Moreover, two thirds of the economically inactive older people mainly rely on their family support, compared with only 8% on public provision (see 6.8).

Therefore, whereas many Western countries regard improving the labour participation rate of older people as a crucial political target at a time of national fiscal stress (e.g. OECD, 2005, 2006), it is fair to assume that the Taiwanese government might not have the same consideration. Consequently, some Western ideas, which highly value older people's

economic activity, such as “active ageing” (Walker, 2002) and “keeping ‘economic usefulness’ in old age” (Estes et al., 2003:70), might not currently raise the equivalent attention within the minds of Taiwanese policy makers. In other words, the activation of an older labour force might not be a priority in Taiwan today, compared with other ageing societies. This might partly explain why employment policy and interventions for older people in Taiwan still remains limited within the PESS.

Third, with respect to the attitudes within the PESS, as described by the case managers, evidences show the whole PESS has paid little attention to the employment of older people’s employment. Instead, the disadvantaged and younger people’s employment barriers and family responsibilities have drawn more attentions. In reality, it seems that the dependency of older Taiwanese on their families are consistently emphasised. For example, as case managers said, “they thought that only the younger workers need to raise children so that they like to give younger workers jobs” (Mr. Liu); “as long as you are old, you should stay at home; let your young family take care of your well-being” (Mr. Lai). Similarly, as 5.22 shows, some employers were reluctant to offer jobs to older job-seekers not only because of ageism, but also because of their assumptions regarding family support towards older job-seekers.

Apart from the above observations, combing the impacts of family’s attitudes (see 6.11) with the rigid economic contexts (see 6.1, the changing distribution of jobs by industries and regions; 6.2, closing down of family and small companies; and 6.3 Emphasis on high industrial technique (IT) manufactures), again, the probability of older Taiwanese returning to work through no other choice but reduced. Furthermore, it is noted that reductions of

pension payments also produce limited effects for unemployed older Taiwanese to return to work (see 6.5). Overall, the above considerations across individual, economic, and social characteristics seem to contribute to a 'not to work' social attitude in Taiwan.

However, as the findings show, the percentages of older Taiwanese who indeed need to fight for their financial stress are actually high. In this scenario, purely depending on family support to secure their well-being is less likely to happen. It shows that being a sandwich generation in terms of family responsibility has become a push-drive for further employment among older Taiwanese (see 6.8).

Moreover, it is argued that the meaning of older people's employment should not be judged simply by financial demands. As 6.9 evidenced, the idea of 'being a useful person' (in relation to personal worth and social status) through having a paid job has become an important consideration in some older Taiwanese minds. Therefore, it is suggested that individual differences between older Taiwanese's in relation to the role they play within families should be fully understood and recognised by policy. Otherwise, it is hard to change the 'not to work' social attitude and remove the complex employment barriers among those 'like/need to work' older Taiwanese.

Gender model and family hierarchy

The literature review in chapter 2 showed that Taiwanese family culture was traditionally hierarchical and emphasised the male line and family unity (e.g. Lee et al., 1994; Davison and Reed, 1998; Zhan, 2006; Chu and Yu, 2010). Generally speaking, first, in the light of filial duty, older Taiwanese were supposed to be respected and supported by their sons (as a social reward); second, older men were usually the head and highest authority in families; third,

the well-being of older women mostly relied on being provided for by their husbands and sons. By contrast, on some occasions, the fathers were expected to secure their adult sons' life. Meanwhile, the family's responsibility to take care of each other is not only a virtue but also a legal duty in Taiwan.

A number of significant gender patterns emerged in the previous chapters. First, as the literature review has shown, men are usually seen as the breadwinners and women as the main carers in Taiwanese families. The older Taiwanese woman is the least likely to stay in work in international comparisons, and when compared to Taiwanese older men. Indeed, the quantitative findings show that the rates of economically inactive older women are twice as high than those for men (see 4.12) but that older men seem to have a much higher unemployment rate (see Table 4.7). Second, the findings in Table 4.7 also demonstrated that gender pay gap between older men and women were large (half of older women were in the lowest income quintile, whereas 36% older men were in the highest income quintile). Third, regarding the expectation of later jobs, older men were more likely to reject to work in certain types of jobs which were labelled by them as feminine, inferior or a loss of face (see 5.21). Fourth, it is also recognised that probability of employment for older men is more often limited by financial responsibilities, whereas older women are constrained by caring responsibilities (see 5.18-19). As was highlighted in last section, older men were probably more prone to stress after becoming unemployed compared with women.

The above findings seem to hint that there might be some collective ideas which construct these consistent gender patterns, simply that, working in old age seemed to be more important for and popular among the older men and that they have a more clear sense of

expectation for later jobs, as well as a stronger motivation to participate in work continuously.

The final part of the chapter 6 addresses how these different meanings of employment by gender role and marital status relate to employment barriers.

Some findings correspond to the above literature. For instance, some older Taiwanese exit early with the support of their children. Older Taiwanese men were more likely to attach their sense of personal worth to their employment condition. Their family and this society might also expect them to stay economically active. By contrast, the desire of older women to work was somehow weaker than those of older men, whilst their pay expectations and positions in later jobs were more flexible.

If taking the whole family into consideration, it seems that a fundamental hierarchy regarding the priority of employment within a Taiwanese family exists and determines the meanings of older people's employment. In terms of the concepts of social rewards, first, the priority for who should work seems to be adult children (especially for sons) within families. Second, older men are supposed to carry the main financial responsibility by working if their children still need them to do so. Moreover, in order to maintain their authority in families, presumably, they are more likely to be expected to work without worrying about losing face. Finally, older women were considered to be the least in needed of work outside, as long as their children or husbands could support them.

In brief, in terms of the Taiwanese family culture, two potential scenarios regarding the priority of employment is identified here.

First, in an extended family without economically independent children:

[Older male workers → older female workers → dependent children and elders]

Older men, as head of family and the main breadwinner, might be supposed to work outside in order to support his family. By contrast, older women might struggle between their caring responsibilities and working role.

Second, in an extended family with economically independent children:

[Economically independent children → older fathers → older mothers]

Adult children are seen as those who should support their parents financially. In this case, pay for older Taiwanese fathers might be a supplementary source.

This social hierarchy could explain why the Taiwanese public usually believes that younger people's employment is more important than that of older people's, and ignore the importance of employment in respect to older Taiwanese. Moreover, the public might stereotypically think that the employment of older men was more crucial than that of older women, because of having more financial benefit to their families. It may be fair to argue that the employment of older workers, particularly women, has been labelled as the least important target and undervalued.

As results of this, again, it will be hard for this society to either increase the older Taiwanese's labour participation rates or facilitate those older job-seekers' employment difficulties simply by current employment policy intervention. Instead, it is suggested that meanings of older people's employment should be re-examined and some identified

stereotypical assumptions should be disputed in order to avoid any underestimating of the value of the employment of older Taiwanese.

7.5 Contemplation on the research process and understanding

Social research using a mixed methods approach often intends to broaden understanding upon the same research questions and expects to overcome the limitations of existing in using a singular method (McKay, 2011; Gary, 2004; Ritchie, 2003; Creswell and Plano Clark, 2007). In this thesis, as mentioned before, the quantitative method has employed before and alongside the qualitative method. One main purpose of this research design was to explore the relationships between the micro and macro levels (Bryman, 1988, cited by Bryman, 1992:59-61). It seems that this research design is practicable; the above findings have illuminated the reasons for the low labour participation rates among older Taiwanese from various angles.

Moreover, it seems that using mixed methods that could offer opportunities to indentify the underlying issues and produce further resources to explain findings from different methods. For instance, through quantitative analysis, apart from the factors and issues of around the employment older Taiwanese, a few underlying problems have been raised as well; for example, why older males suffer from higher unemployment rates when their motivation to work used to be higher than that of older women? Reflecting on the lessons from the intensive interview data, it is concluded that a combination of gender stereotypes and meanings of older people's employment become not only "push" but also "pull" factors for older men in the Taiwanese context. This finding also has an echo in one of the major quantitative findings that explains why the expectation of later jobs has become a significant

barrier to employment for older males. Additionally, the statistical findings regarding family responsibilities of older people have been used as supporting evidence.

Apart from the benefits of employing mixed methods, this thesis has argued that the complicated interactions between the individual, economic and social contexts not only determine older people's employment rates, but also have shaped and have been shaped by the overall social attitudes of older people's employment.

However, challenges and limitations in terms of using mixed methods remain. First of all, as mentioned in 3.2, one reason for using mixed methods is because this research aimed to generate a wide-ranging understanding of the barriers to employment for older Taiwanese. The benefit of this decision-making is described above, but it has to be admitted that either using a multiple methods or answering questions in a broad context risked missing the chance to recognise specific points. For example, instead of discussing a single perspective in depth, this research often needed to focus mostly on similarities, such as, the impacts of each dimension, employment barriers of each type of older worker, or social attitudes among different groups.

Second, time was undoubtedly an issue. The scope of quantitative as well as qualitative analysis was limited by this. For instance, as motioned above, this research chose to focus only on a single year analysis rather than a cross-year quantitative comparison. Similarly, the scope of interviews also had to be narrowed down in the west of Taiwan. Although the advantages of using the mixed methods have been highlighted above, it is necessary to carry out further studies to augment research findings.

7.6 Suggestions toward further policy making and research

As for the implications on design of future employment policy for older Taiwanese, a number of lessons could be drawn from the ALMPs' positive effects. The ALMPs offer both incentives and sanctions to increase the capability of employees and employers to activate the labour market and their motivation (Kluve and Essen, 2006). At the same time, individual employment services and training resources are created as solutions to improve a worker's employability. In particular, "job search assistance, provision of training, subsidization of job creation in the private sector, and direct job creation in the public sector" are identified as four major areas within ALMPs (Kluve and Schmidt, 2002:411).

Regarding the positive effects, the ALMPs have significantly reduced the aggregate numbers of unemployment benefit claimants; more than half from the highest period in Denmark, Ireland, the Netherlands and the U.K. (OECD, 2005). Moreover, the evidence suggests that the successful experiences of re-entering labour market, even short-term jobs, can lead to a "virtuous circle" for further occupational development, and it has been found that work-first programs have positive short-term impacts (2005). Moreover, Kluve (2006) has shown that direct wage subsidies are likely to be more useful than employment programmes.

Surprisingly, 'sticks' and 'sanctions' have a more effective influence than 'carrots' and 'assistance', in terms of increasing workers' job-seeking rates (Graversen and Ours, 2006; Kluve, 2006). However, it is also argued that selecting clients to serve, also called the 'creaming' effect, has become a particular problem, as this excludes disadvantaged groups from the major labour market (Jahn and Ochel, 2007)

With respect to how to activate an older labour force by policy intervention, Hartlapp and Schmid (2008, 414-8) point to seven influential factors: these are “labour demand, education, employability, health conditions, job satisfaction, relative wage costs and taxes”. Also, reforming pension systems and increasing older peoples’ working motivations by providing financial incentives are essential (Carmel et al., 2007:394; Hartlapp and Schmid, 2008:423).

Overall, reflecting on the findings of this research in combination with the Taiwanese welfare context (for example, limited public intervention, the rejection of welfare dependency), a number of crucial lessons can be learnt from the ALPMs in terms of the activation of older peoples’ labour participation rates.

For government and social attitudes

- ⊙ Increasing governmental responsibility for activating older workers’ employment opportunities.
- ⊙ Increasing awareness of an ageing labour force issues and developing a public discourse towards activating older workers’ identity and employability.

For the employment policy making and services

- ⊙ Creating ‘carrots’ to encourage older workers to remain or re-enter the labour market by reforming the pensions systems and supplying additional incomes.
- ⊙ Enlarging accessibility of PES by creating incentives to invite private sector participation.
- ⊙ Allowing the flexibility for PES frontline workers and case managers to provide individual and tailored employment services and to avoid the ‘creaming’ of services users.

- ⊙ Integrating current long-term and short term employment services programmes in order to ease the difficulties of older workers employment and to empower them to engage in paid work.
- ⊙ Using unemployment benefits as sanctions and, at the same time, provide additional training and wage subsidies as 'carrots' to motivate older workers' job-seeking.
- ⊙ Creating direct incentives and essential sanctions for employers in order to raise their willingness to hire and retain older workers.

However, given the specific social attitudes towards older people's employment in Taiwan identified here, and because of the different economic, social and policy contexts, presumably each country has their own specific social attitudes towards working in old age (as well as different constructions of older workers' social capital). Thus, it is less likely that a one-size-fits-all labour market approach could really reflect the dissimilar social attitudes and issues of older workers' employment in a sensitive way (Flynn, 2010).

For instance, the governments' attitudes and reasons resulting in early exit are different between the West and Taiwan. In the West, early retirement in relation to the design of the pension system has produced a remarkable impact on discouraging older people's later employment (Walker, 2002; Vroom, 2004). Thus, it is known that national fiscal stress has led to an increase in government motivation to activate older people as a labour force (OECD, 2006; Samorodov, 1999).

By contrast, as found in this research, the not-to-work social attitudes have been co-constructed by interactions between individual, social and economic factors, such as, consistent emphasis on family responsibility, absence of abundant pension payments,

ignorance of older people's financial duty, underestimation of the value of later employment, limited employment policy intervention for older Taiwanese and so forth. Hence, despite these practical lessons learned from the ALMPs, localising the cross-regional labour market approach before being put into practice should be taken into consideration. In this case, how to localise ALMPs in the Taiwanese context might require more academic effort.

Considering this research adopted a broad standpoint to explore the employment circumstances, barriers to and meaning of employment of older Taiwanese in old age, as well as the social attitudes towards older people's employment, further researches are required in order to produce more evidence and deeper understanding in this field. For example, as mentioned above, it might be beneficial to gain more insights about the changes to the employment circumstances of older Taiwanese by comparing the same quantitative data from different decades.

Despite the case managers' opinions, it is meaningful to examine how the attitudes of Taiwanese, employers, policy makers (in central government) have influenced the labour participation rates of Taiwanese. Based on Lipsky's street level bureaucracy perspective, it is worth exploring how the attitudes of case managers towards the employment of older workers are shaped or have been shaped by service delivery.

Also, it might be beneficial to conduct further research to examine the credibility of the categorisation of older Taiwanese made in this research; for example, comparing the difference between the two identified groups (Group 1 and 2) in order to explore what exact barriers remained an obstacle their employment. Or, exploring the similarities and differences in employment circumstances and barriers within subgroups in each group; by

doing so, the question of whether or not they encounter similar employment difficulties could be re-checked; also, the specific demands of policy interventions could be better understood.

Given that 'men are the main breadwinners and women are the main carers' is also a predominant gender model in many East Asian and Western countries, it is worthwhile conducting international comparisons to see whether or not the gender model has produced similar discriminatory thoughts towards older men or women. Moreover, the influence of the role of independent children's support in different cultures towards older people's employment could be studied as well. Other factors that could be examined could include demographic factors or working history, as well as the interplay of gender and the constructed meanings of employment in old age, in Taiwan or other countries.

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DWP

Working Age and Employment Reports 1998-2004

<http://statistics.dwp.gov.uk/asd/asd5/wae-index.asp>

Age and Employment

<http://statistics.dwp.gov.uk/asd/asd5/agepositiveindex.asp>

9 APPENDICES

Appendix 9.1 The Annual Manpower Survey

⊙ Survey title

The Annual Manpower Survey

(was called Supply of Manpower-civilian Population Aged 15 and above)

⊙ Survey conducted institution

Directorate-General of Budget, Accounting and Statistics (DGBAS)

⊙ Frequency of surveys conducted

This has been conducted from 1983 onwards. Since 1993, the data is collected once a month; electronic reports are published monthly, quarterly and annually. The annual survey is undertaken in the week right after 15th of May.

⊙ Usage of this survey

On the basis of random sampling of all Taiwanese households, this survey is used as the fundamental source to calculate employment and unemployment rates and other relevant statistical data in Taiwan.

⊙ Coverage of this survey

Taiwanese who are aged 15 and above in 23 administrative regions (23 cities & counties), but those in military services or in prison are excluded

⊙ Sampling, data collection and response rates

✓ Sampling methods

In order to achieving random and comprehensive sampling purposes, the two-stage stratified random sampling method is employed.

First stage: systematical and random selecting of 532 basic administrative units (by tsun and li) within 23 administrative regions by interval sampling method.

Second stage: within the 532 selected units, randomly selecting 3 % of all Taiwanese households. It often contains approximately 20,300 households and 60,000 Taiwanese persons aged 15+.

✓ Data collection

The same questionnaire is used as a data collecting tool by face-to-face or telephone interviews. Data is collected once a month in the week following the reference week (covering 15 days of each month)

⊙ **Definitions of terms in this survey:**

- ✓ Labour forces: People who aged 15 +

Employees: People aged 15+ who have paid- work or work unpaid in a family business for over 15 hours per week

Unemployed worker: People aged 15+ and do not have work but can start work immediately or are looking for work

Inactive labour forces: People aged 15+ who do not work because they are 1) students, 2) running a household, 3) disabled, 4) elderly, and 5) unemployed and unwilling to seek work

- ✓ Full-time and part-time workers:

For workers who work for a single employer, full-time workers refer to employees whose working hours satisfy an employer's full-time requirements. By contrast, those working hours less than an employer's full-time required hours are part-time workers.

As for workers who do not work for a single employer (including self-employed workers): workers who work over 35 hours per week are considered to be full-time workers; less than 35 hours are part-time workers.

⊙ **Groups of research questions in questionnaire (in 2008)**

Individual and household background information

Part 1-----

Income

Working conditions (Full-time or part-time; working hours)

Working years in current job

Numbers of changes of jobs in last year

Working place and position (locations, industry and mode of enterprises, occupations)

Reasons for changing job (including voluntary and involuntary)

Reasons for stopping working in paid-jobs

Part 2-----

Ways of job seeking

Motivation for changing job or seeking additional jobs

Have started job-seeking or not

Part 3-----

Expectation of type and income of new jobs (if the answer to 9.10 is "yes")

Details of job-seeking process (if the answer to 9.10 is "yes")

Financial conditions during job-seeking process (if the answer of 9.10 is "yes")

Part 4-----

Have you been in paid employment or unpaid family business for over 3 months in the last year?

Reasons for leaving last job

Activities of job-seeking

Motivation for entering labour market and expectations for new work

Part 5-----

Numbers of dependent and independent children

© References and further information about this survey

In Mandarin:

DGBAS, "Introduction of Survey", accessed from:

<http://www.dgbas.gov.tw/ct.asp?xItem=16954&ctNode=3244>, accessed date: 01/Feb./2008

In English:

DGBAS, "Outline", accessed from:

<http://eng.stat.gov.tw/lp.asp?CtNode=1607&CtUnit=757&BaseDSD=7> , accessed date: 01/May/2008

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<http://eng.stat.gov.tw/lp.asp?CtNode=1607&CtUnit=757&BaseDSD=7>, accessed date: 01/May/2008

Appendix 9.2 Recruitment advertisement

A. Interviewees wanted!!

Please give me 1 hour and tell me about your working experiences with older clients and your thoughts regarding their barriers to employment. Freedom to participate or withdraw from this research is guaranteed! We can do our interviews either at your office or we can discuss the venue later. Please just call or e-mail me right now!

B. What does this research want to know?

'To work or not to work? -- older workers' employment circumstances, barriers and the meaning of employment'

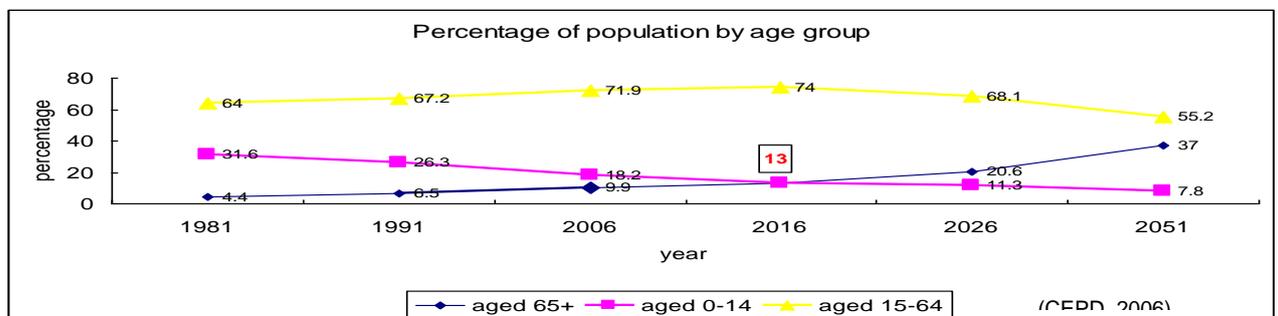
This research aims to explore why there are low labour participation rates among older Taiwanese in relation to individual and socio-economic contexts.

C. Who is the researcher?

I am a PhD student at the Institute of Applied Social Studies, University of Birmingham. This research is my PhD thesis. I was also one of your working partners as a social workers' supervisor in the Taoyuan-Hsinchu-Miaoli Region Employment Service Centre for 4 years.

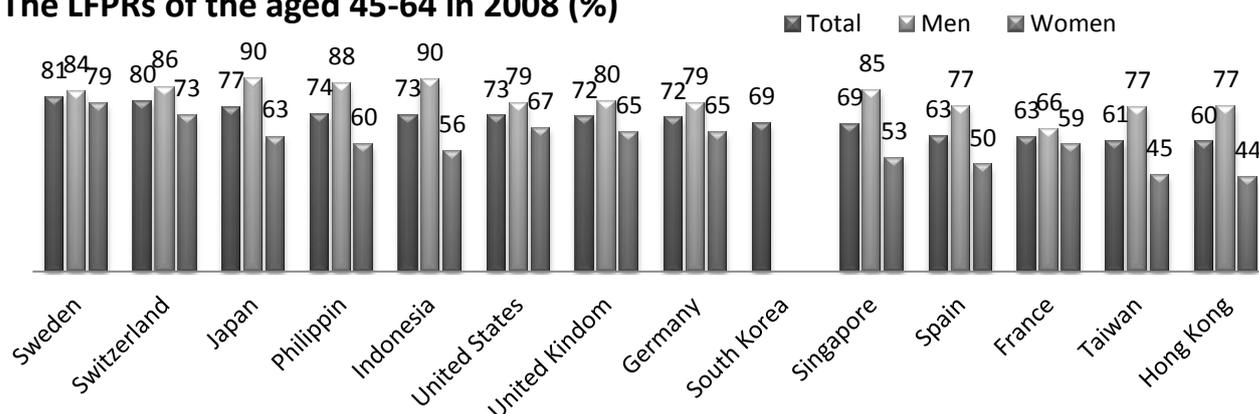
D. What will happen in the future?!

Living longer and working longer: in Taiwan, there will not be enough younger-aged workers (15-44) and older workers will have to work longer— **Yes!! We and other older people will have to work longer for our future and society.** As the below figure shows, by 2051, more than 1/3 of our population will be aged over 65; in the meantime, who will have to work for our future?! Yes!! You are right...older workers will!



However, it is likely that Taiwanese society might meet a significant challenge in the future if the labour participation rates for older Taiwanese remains at same level from now on. With regard to older people’s labour force participation rates (LFPRs), according to the International Labour Organisation (ILO), it is noted that older Taiwanese have the lowest possibility of remaining in employment among these countries, 20%, 17% and 12% lower older workers’ LFPRs than Sweden, Britain, Japan and South Korea (LABORSTA Internet, ILO, 2011; DGBAS, 2011). Philippines

The LFPRs of the aged 45-64 in 2008 (%)



Sources: LABORSTA Internet, International Labour Organisation (ILO), 2011; DGBAS, 2011

Remember...

Your knowledge about older people’s employment barriers is the vital to shed light on this crucial issue.

Just e-mail/call me and I will send you more details of this research and the interview guide.

Appendix 9.3 Information Sheet for potential participants

1. Research title

'To work or not to work? -- older workers' employment circumstances, barriers and the meaning of employment'

2. Researcher

Lillian (Pei-Ling) Huang Contact details ----

A PhD student at the Institute of Applied Social Studies, University of Birmingham

3. Purposes of this research

This research aims to identify the micro and macro factors that cause low labour participation rates among older Taiwanese. It starts by exploring the influential individual factors that have an impact and functioning as barriers on limiting the probability of employment for older Taiwanese; and then seek to understand how the social-economic contexts construct meanings of employment for older Taiwanese and produce further barriers to limit possible employment.

4. Participation and withdrawing

If you have or had face to face work experience with older workers in the Public Employment Services System, you are more than welcome to join this research as an interviewee. Your willingness and participation is highly appreciated.

You would be free to withdraw from this research whenever you choose; should you wish, just call or e-mail me: I can guarantee that your data and information will then be destroyed and not be included in this research.

5. Schedule of interviews

The main purpose of the interviews is to explore what factors limit the employment of older Taiwanese workers and result in low labour participation rates. This is relevant to your daily working experiences with older clients or even older friends. All discussions will be around this issue. There is no a right or wrong answer. Any information, ideas and findings from your work experience are valuable and vital for this research. In fact, you don't have to do any preparation before the interview. All you have to do is to share your existing knowledge and work experience.

The interview will take one hour and will be conducted at your workplace during your lunch break; however, if you want to choose another public venue suitable for our conversations, please let me know. All our conversations will be recorded for academic purposes. Initial findings and a summary of the final report will be sent to you by either post or e-mail.

6. Confidentiality and usage of data

All data will be used anonymously and only for academic purposes. In order to ensure confidentiality, you may choose to give a pseudonym as your 'name' during the interview process.

After the interview, the data will be analysed and all information will be stored and saved in locked places or on a password-protected laptop.

Final results of the analysis will be submitted as part of a PhD thesis or maybe published in academic publications in the future.

7. Concerns and requirement

If you have any concerns or uncertainty of this research and need to discuss them individually with someone else, you can contact this researcher's supervisors:

Stephen McKay [REDACTED]

Professor of Social Policy, Institute of Applied Social Studies, University of Birmingham

John Doling [REDACTED]

Professor of Social Policy, Institute of Applied Social Studies, University of Birmingham

Feel free to ask for professional translation services by using pseudonyms or anonymously and I will pay bills to these translation companies directly for you.

Appendix 9.4 Informed Consent Form

Research Agreement

Please sign this form before the interview in order to ensure that you fully understand the nature of this research and your rights. Please read the statements below carefully and ask if there are any statements which you do not fully understand before you sign. Meanwhile, I have signed to say that I shall follow ethical guidelines and a copy of this form will be left with you.

Research title

What micro and macro factors limit the employment probability for older Taiwanese?

Researcher

Lillian (Pei-Ling) Huang

A promise for following ethical rules from the researcher

I, Pei-Ling (Lillian) Huang, promise to follow all ethical guidelines outlined in the information sheet

Researcher's Signature _____ Date:

Informed consent from participants

1. I confirm that I have read the Information Sheet and fully understand its contents.
2. I agree to participate in this research as an interviewee.

Participants Signature _____ Date:

Appendix 9.5 Interview Guideline

Before interviews

- Introduction of this research's background aims and process of interviews
- Explanation of why I'm interviewing case managers and how important their understanding of older people's employment probability is and the potential contributions this research might have
- Highlight anonymity and confidentiality
- Explain why and invite them to read information sheet again and sign the informed consent form
- Ask if they have any questions before the interview

In the interviews

Two foci of interviews

1. Employment barriers caused by older people's individual, economic and social policies factors
2. Employment barriers and meanings of employment in old age by social-economic contexts

Section 1 Background

Understanding the participants' background information: working positions, years at work, responsibilities, and so on

Section 2 Main interviews

A. Drawing lessons from (un)successful cases (2 cases)

Background information of each case (reminding them to use pseudonym for their names)

Brief descriptions of work experiences and history of each case

Brief descriptions of process of providing services to each case and its result

What are the important factors which determined them getting a job (un)successfully?

How did these factors function as barriers that influenced their employment probability?

What are the important barriers which limited them getting a job (un)successfully?

Why did you choose this successful/unsuccessful case to share with me? (What else do you want to tell me about this case in relation to older people's employment barriers?)

B. Working opportunities for older workers

What kinds of opportunities for work are more likely/ unlikely to be open to older workers?

What individual factors and barriers limit access to these jobs for older people?

What kinds of employers (including public sector) are likely/unlikely to recruit older workers?

What role does public employment policy play in relation to increase/decrease older people's working opportunities?

C. Probability of staying in work, individual factors and barriers

What kinds of older people are more likely/ unlikely to stay in work? Why?

What kinds of individual barriers limit older people staying in work?

D. Probability of staying in work, economic and social policy factors and barriers

What kinds of economic factors limit older people staying in work?

How does this factor play limit their employment probability?

What significant difference regarding the impact of this factor by individual factors exist?

How do relationships between this factor and the other individual factors shape older people's employment barriers?

E. Probability to stay in work, social factors and barriers

What kinds of social factors limit older people staying in work?

How does this factor limit their employment probability?

What significant difference regarding the impact of this factor by individual factors exist?

How do relationships between this factor and the other individual factors shape older people's employment barriers?

F. Link between social and economic factors and meanings of employment

How do the above social and economic factors influence each other and limit older people's probability of staying in work?

How do these social-economic factors influence determine the meanings of employment for older Taiwanese?

How do these links influence older people's probability of finding work?

G. Do you have any suggestions about how to improve older people's employment probability of staying in work?

H. Do you have any suggestions about how to improve older people's employment probability of finding work?

I. Do you have any suggestions or questions of this research?

J. End and offer appreciation. Discussions about whether or not to send them their own transcript, mp3 recording and updates on work progress.