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Globalization and ageing workers: constructing a global life course

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Abstract

Purpose – Globalization has speeded the flow of development across borders, encouraging the movement of both labour and capital. Although it has been well-documented that labour is less flexible than capital and that unskilled labour is disadvantaged by these trends, the impact of globalization on older workers has been largely ignored. The critical gerontology perspective can contribute through its focus on globalization's effects on labour market opportunities and social welfare benefits. This paper aims to address these issues.

Design/methodology/approach – This is a theoretical paper on ageing.

Findings – This paper examines four issues faced by older workers in an international context in order to more fully understand the differential impact of globalization by age. First, the paradigm of globalization assumes a youthful labour force willing and able to relocate search of employment opportunities, criteria inapplicable to many older workers. Second, human capital inequalities produce differing opportunities for older workers to respond to economic changes. Third, existing social welfare provisions are relatively durable and likely to affect older people in complex ways. Fourth, varied levels of international development and life course possibilities produce differences between countries and regions.

Originality/value – This paper is original in highlighting how a lifetime of constraints placed upon older workers by their moral and political economies make their integration into the idealized global market difficult and pose larger questions about understanding the life course in a global context.

Keywords Elderly people, Globalization, Older workers

Paper type Research paper

Labour markets are a product of economic and social arrangements and of moral economies. These moral economies create life course expectations and social meanings that justify the arrangements required for these markets to function. Normative ideas about education, work and retirement legitimize occupational decisions by providing a patterned system through which workers can organize their lives. Though workers exert agency and resistance by reworking narratives to fit their needs, they are bounded by the interaction of larger structures that constrain their opportunities (Sewell, 1992). The integration of global markets and the opening of global capital, labour and information flows has introduced new structural constraints on the choices available to workers and generated new narratives of work and ageing. Nations attempt to exert "biopower" through control over fertility, immigration and labour markets (Foucault, 1995). Although these measures often have limited success, they have been crucial in forming policy narratives that define national economic goals. As these goals have been reworked to fit the imperatives of a global marketplace, nations have been forced to adapt to these changes. The new narratives created in this process call for alterations in welfare policy, reductions in state spending, deregulation and a reorganization of government priorities to reflect a growing consensus on the inevitable growth of globalization.

While the degree of globalization experienced by individual nations, as measured by flows of labour, capital and other economic indicators, is highly variable and the "objective" indicators difficult to measure, as Stiglitz (2003) suggests, its social

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construction ensures that a global market will be influential. The concept of globalization has provided a frame for transforming work, welfare and regulation policies, even when it is uncertain that such changes actually enhance global competitiveness. What matters is that the changes attributed to globalization cause states and policy makers to respond to the rhetoric when making political decisions and economic choices.

Because a large share of national resources in every nation is devoted to the aged, they are a crucial starting point for delineating responsibilities between the state, market and family (O'Connor *et al.*, 1999). Definitions of ageing workers must be renegotiated in order to make countries more compatible with globalization narratives. Just as employers, policy makers and social movements created the idea of labour force exit in old age through retirement, so globalization reconstructs ideas about aged workers in ways that are likely to have equally large consequences. At stake is the underlying logic of labour markets and the premises undergirding social responsibility across the life course.

Interestingly, however, the experiences of aged workers are crucially missing from the dialogue on globalization. Although older workers are commonly problematized, they are rarely seen as critical components of changing economic conditions. Yet, ageing workers represent a key discursive creation of the state. Treatment of the aged reaffirms normative life course expectations and provides the foundation for many state policies. As the status of older workers shifts, all workers experience changes in labour market possibilities. Redefining work expectations in old age changes younger workers' expectations about their future status, transforming a range of social behaviours.

In this paper, I will first examine traditional measures of globalization including the movement of labour and capital and the increased importance of global financial markets. Second, I will argue that globalization alters interactions between individual biographies, firm decisions and state policies in distributing human capital to older workers. Third, I will explain how policy histories of individual nations interact with global policies to produce divergent outcomes. Examining these interactions can help to show the importance of national differences and the way these differences influence the framing of change. Finally, I will argue that globalization is marked by an international division of labour imposed on nations with diverse histories and social contexts. As a result, economic consensus on the goals of globalization will not necessarily result in similar policies. In the long run, these global changes have the potential to alter the status of ageing workers and recommodify the entire labour market.

Moving labour and capital

Though the international division of labour and global exchange of material has long been a part of the international economy, the end of the Cold War and increases in foreign direct investment have spurred increasing interest in globalization (Gilpin, 2001). Three general measures of globalization capture much of the change that has affected public policy. First, capital and labour shift to areas where they can be most efficiently used. Labour travels to areas where wages are higher, whereas capital travels where labour is cheaper. Second, total trade (exports+imports) constitutes a larger part of national gross domestic product (GDP). Finally, international financial markets are integrated, and global capital flows become essential to investment and development. Each transforms the meaning of ageing workers by disrupting the traditional economies of ageing.

Differing levels of economic resources shape political economies, whereas new ideologies of the life course alter moral economies of labour markets.

Because labour will flow towards areas with higher wages, industrialized countries will receive an inflow of immigration from developing countries. These young workers fill jobs that supplement national economies, increase GDP and raise tax revenues (Bongaarts, 2004). Older workers poorly fit into this narrative, because they are seen as less productive than the ideal immigrant worker. They are also more "at risk" of using government programs and contribute less to tax revenues than workers who immigrate earlier in life (Schaafsma and Sweetman, 2001). Policy narratives that highlight young workers travelling in search of higher wages do not include older workers who might also be interested in better job opportunities. Immigration policy in much of the world prioritizes spouses and children of immigrants over their parents or older relatives, in part for these reasons. Thus, normative ideas about how the age of immigrant workers fit into national and global goals place constraints on the agency of older workers.

The global movement of capital raises similar issues. Foreign direct investment by corporations can impact the economic well being of aged workers across the world. Many firms place both direct and indirect boundaries on the types of workers they are willing to hire, often sectioning off jobs on the basis of gender and age (Collins, 2002; French, 2002). To the extent that capital investment and global trade privilege younger workers, there will be fewer opportunities for older workers and increased demands on social networks to provide for them.

If older workers are excluded from immigration flows because corporations investing in a global marketplace discriminate against them, they will be forced to increase their contributions in the informal labour market. This may take the form of unpaid care work, where aged workers support their children and relatives and add to familial resources for families (Pyle, 2006). This work, however, is routinely degraded, and not considered an economic contribution that is valued in the workplace. Although care work contributes to the economic well being of households, it does not allow for integration into labour markets. Over time care workers are likely to find their opportunities for labour market re-entry reduced, especially into high paying and competitive fields.

Aged workers who cannot find work may also be pushed into informal labour markets, creating additional difficulties. As informal markets increase as a share of the total labour market, governments will find it more difficult to protect older workers who may only be able to find employment in poorly regulated industries. The expansion of the informal economy also creates a problem for states in the form of a loss of tax revenues. Though some governments have adopted vouchers and other credit systems as a way to exert control over this diverse economy, they face multiple barriers to collecting tax revenues and exerting regulatory control over informal jobs (Jones *et al.*, 2006). In this scenario, older workers may remain in the labour force longer but not contribute tax revenues needed to support pension and health-care programs.

Global financial markets increase the importance of investment as high reward and risk capital endeavours present themselves across national borders. Capital investment has always been a concern of social welfare policy. In the USA, Social Security was converted to a pay-as-you-go system because of concerns about the build-up of capital in a government-controlled trust fund (Beland, 2005). Current rhetoric surrounding Social Security has replaced the emphasis on security with an emphasis on savings and investment (Quadagno, 1999). In this scenario, ageing workers are expected to integrate their retirement funds into a globalized financial market, producing high returns and increasing global productivity. High growth in emerging markets will help prop up pension funds and entitlement programs in the developed world. What's neglected are low-income older workers for whom individual saving for retirement is unlikely to produce economic security and immigrant workers who may be ineligible for tax breaks and savings incentives given to citizens.

The global narrative of labour and capital is not novel, but the effects that it will have on the life course decisions of ageing workers will be great. If ageing workers are limited in their mobility because of the goals of emigrant countries, they will be unable to share in the potential benefits of labour market flexibility. Likewise, the increase of retirement policies built around individual savings disrupts prior life course expectations for workers. Traditionally, defined benefit policies provided economic security by offering a stable income for workers until death. As these policies have been replaced by defined contribution policies that reflect worker savings, aged workers can expect divergent outcomes. For some workers, the individualization of risk through private accounts will result in less time in the workforce and early exit. Others will find that they lack sufficient savings to provide an adequate retirement income. Rather than normative life course features determining later life choices, differential access to market resources becomes crucial to ageing workers and the choices available to them.

Human capital and ageing workers

In industrialized countries, life course expectations have been built around clear distinctions between education, work and retirement. These strict demarcations have broken down, however, as global demands for labour and capital has reduced expectations of lifetime employment and geographic stability. Such changes affect the economic status of workers by shifting much of the responsibility of obtaining and keeping employment to the individual. Workers are encouraged to develop their human capital rather than expect lifetime employment with a single firm (Becker, 1964; Friedman, 1999). For those at the lower tier of the labour market who are unable to expand their human capital because of a lack of education or current work environment, these changes can hinder their ability to respond to the demands of an increasingly globalized economy.

The ability of older workers to increase their human capital and respond to the requirements of globalization depends on four factors. First, older workers must be retrained easily and effectively. Second, states will differ in their level of commitment to programs and the national problems they are meant to solve. These resources will determine how successful transition periods are for older workers. Third, employers will make decisions about spending firm resources on educating older workers. Finally, labour markets will have differing levels of disruption and thus need for retraining depends on the types of market change experienced. The human capital model can be helpful in understanding these changes, but it must take into account that states and employers help to distribute capital across social groups. Global economic changes will be crucial in helping to understand how these decisions will be made. Ultimately, states and corporations will determine whether it is more efficient to retrain and educate older workers or hire from new labour markets opened through immigration or capital relocation.

Older workers may find retraining difficult due to competing life course expectations. Those who care for children or grandchildren and who still have familial financial responsibilities may lack the time or economic resources to engage in additional education or vocational training. Even those who are able to attend university or training may find completion difficult due to these additional demands. They may take longer to finish a degree than younger people and are at greater risk of being unable to complete their studies (Dougherty, 2002). Because credentializing can be inefficient and time-consuming, many older workers may rethink their labour market participation entirely. Cohort differences in levels of human capital may also determine the benefit relative to cost of additional training. As more employers expect their employees to have a college education as a marker of work skills, older workers with similar skills and intellectual abilities as younger workers may still have to receive a university degree to meet a new minimum standard for many high-skilled jobs.

States will help control human capital flows for older workers as policy decisions adjust how older workers are commodified. Electoral coalitions and demographic concerns will legitimize certain types of policies such as bridge employment or retraining. Policies that favour bridge employment are likely to privilege part-time and temporary employment for older workers while total retraining policies will encourage career shifts and require long-term planning. National program histories are difficult to change as differing moral and political economies allow more freedom in changing work expectations. Changing goals from increasing employment of the young to keeping older workers in the labour market alters state policy and has proven to be difficult (Guillemard, 2003). After a certain age, states may be unwilling to spend finite resources on older workers. States must then balance concern for older workers with other ways of increasing human capital such as immigration and capital relocation. Amounts of resources directed towards these policies will also determine how useful they will be for all older workers. Resources that do not provide income replacement during retraining may create inequalities among older workers able to afford retraining or career shift. Older workers who have accumulated more wealth are more decommodified and would have an easier time postponing work for increased education. Aged workers with fewer resources may be compelled to accept any available employment, reducing opportunities for entry into high-skilled work regardless of their levels of human capital.

Employers also control human capital by paying for education and controlling promotions that assist employees in gathering new skills. Businesses will be more likely to train workers that are likely to bring returns to the company. Costs spent retraining older workers will be balanced against alternative labour arrangements. Businesses may decide that they are more likely to receive an adequate return from training of younger workers or new pools of immigrant workers. Such decisions reflect social biases and ageist opinions of older workers rather than objective evaluations of work contributions. If employers view older workers as more resistant to change, less willing to work and less able to make a commitment to a firm, then opportunities for older workers to accrue human capital will decline.

Global capital flows determine what types of jobs can be efficiently moved. Older workers represent larger labour costs in developed countries. Where labour is a higher percentage of total costs or labour cost savings of capital movement is high, industries will be more likely to leave. New labour markets that resemble the old where human capital is easily transferable will require little retraining for older workers. However, low similarity may mean either that extensive retraining is needed or that workers are overqualified for jobs in different sectors. Skilled labourers leaving heavy industry in developed countries may find their human capital does not transfer well and move towards the lower tier of the expanding service sector. Labour markets receiving new capital investment are also dislocated, and prior skills will not necessarily translate well into these new industries. If businesses are concerned about how older workers will respond to these changes, they are likely to prefer hiring younger workers. As a result, commitment to training and outcomes beyond simple calculations of unemployment will be crucial. Countries may see low levels of unemployment only because they fail to measure older worker's levels of underemployment, ignore the financial turmoil caused by jobs that fail to provide financial stability for households or the frustration that occurs with jobs that do not utilize skills that have been cultivated over the life course. Careful longitudinal studies will be required to determine if older workers are successful in labour market integration.

The human capital perspective is an effective way of looking at older workers and their opportunities in the global economy. However, human capital must be viewed as more than a collection of individual choices for education, work and training. It is a commodity subject to structural constraints and inequalities in distribution. Employers and states may be committed to increasing the human capital of older workers or may instead pursue alternatives presented by new globalized economies.

Policy feedbacks from existing social welfare provisions

As global markets become more visible and influential, political leaders may place concerns about economic changes over the well being of their population. However, politicians are still responsible to their constituents for re-election. They will not actively pursue policies that destabilize populations without concern for their political careers. The public continues to favour certain types of "risk reduction" programs, even if there is disagreement about the types of programs best suited to achieve these goals. The state must balance its role in protecting against potential risk while respecting individual agency in ways that are seen as legitimate across the life course (Powell and Wahidin, 2005). Which programs will be able to survive electoral fears about global economic competitiveness and individual choice while maintaining electoral support will depend in part on policy histories and framing employed by political actors. Welfare state programs matter to the work opportunities of the aged because they form the boundaries that commodify or decommodify stages of the life course (Offe, 1984). States influence on the choices of older workers through policies that remove older workers from the labour force or provide incentives for their exit.

Social programs such as pensions and health care create a built-in constituency with a sense of entitlement. As long as governments and bureaucracies competently handle policy, it is difficult to problematize these social programs and recommodify workers. Since the goal of many globalization policies is to reform the status of ageing workers, changing traditional moral economies through social policy becomes crucial. These changes cannot be justified solely on the basis of macroeconomic productivity. Many of the welfare programs that were formed in the mid twentieth century, particularly those in "social democratic" states, contained a role for economic redistribution (Esping-Anderson, 1990). Public policy was not only built around economic security but also sought to ameliorate income inequalities. These legacies have created public discourses on poverty and inequality that require more than changes from globalization to alter. The coalitions that have helped to create these programs will not quickly abandon them as citizens are reluctant to give up programs seen as protecting workers of all ages.

Because workers continue to show high support for government programs that protect against risk and ensure certain living standards, many globalization policies rely on prognostic framing that problematizes current economic conditions as unsustainable in the context of global changes (Benford and Snow, 2000). If citizens can be convinced that their long-term economic status depends on economic restructuring, they will be less likely to resist the change and more wiling to accept the consequences. Alternatively, other social movements have mobilized around globalization as a frame that emphasizes lost control over national economies, job dislocation and decreased local control over cultural products. These economic changes have been strongly linked to constructing existing government programs such as health care and pensions which are seen as being in "crises". Ageing concerns must be addressed by policy actors seeking legitimacy is responding to these "crises". Whether or not frames that support or challenge globalization will impact older workers will depend on their ability to incorporate them as crucial to their presentation.

As policies are reconstructed to correspond to the narrative of globalization, ageing workers are in an especially precarious situation. Traditionally, programs such as pensions and health care for the aged have been framed as social responsibilities that require intergenerational solidarity. Supporters of government protections against income and health insecurity often present these programs as necessary for a dependent population that has done their service to the nation. The changing and contradictory rhetoric of globalization, however, problematizes the potential needs of the elderly while supporting longer labour force involvement. These frames are portable and help to support whatever policy is desired. Actors may employ contradictory frames when they fit with movement goals. The same actors that attack pension plans because of their insustainability may support increased immigration under the guise of protecting the same programs.

In the rhetoric of globalization, there is sufficient flexibility to support virtually any position. This places older workers at a disadvantage as life course expectations that require years of preparation become fair game for political actors. Ageing workers concerned about the political sustainability of any program may be either overly conservative or destructive when deciding how to approach a current government program. This constant reorganization most heavily affects ageing workers, who have the largest potential variation in status depending on how they are commodified. There is also the risk of the most damaging portions of both frames becoming politically viable. Older workers could be seen as a drain on resources and unable to make a meaningful economic contribution. In this scenario, aged workers are neither legitimate persons to be decommodified, nor normal citizens able to contribute to macroeconomic goals.

Differential status of the elderly in developing and developed countries

The dichotomy between "developed" and "developing" countries underestimates the number of countries that are overlooked by this stark distinction and fails to recognize the diversity of experiences found within countries. Nevertheless, distinctions between where countries stand on the international division of labour, even if oversimplified, help explain how varied responsibilities in the narratives of globalization do not offer a single and unified vision of ageing that can transcend national borders. Instead, the varied responsibilities and abilities of differing states will produce different levels of ability to fit into the global framework of market integration.

Policy legacies vary among states and result in diverse potential paths for social programs. Developing countries are influenced by international organizations such as the World Trade Organization (WTO) and the World Bank which affect policy choices by grouping economic benchmarks and international assistance to certain social welfare policies. International aid and debt assistance have been attached to economic restructuring in many developing countries. Alternatively, Organization for Economic Co-operation and Development (OECD) countries must deal with the policy legacies created by past governments. Many of these programs have become synonymous with democratic representation, and in many countries, the right to certain benefits such as health coverage is written into national constitutions (Jost, 2003). The exogenous influences on developing countries create difficulties for democratic representation and may inhibit the same types of assurances written into national law. These differences may restrict the ability of countries to move towards an idealized global market, regardless of the potential benefits or losses.

During the 1980s and 1990s, welfare expenditures of less developed countries fell, because organized labour and other program constituencies were unable to mobilize politically (Rudra, 2002). By contrast, in developed nations, coalitions among the elderly, labour organizations and other groups created electoral majorities that protected welfare benefits. If these constituencies are weak, welfare expenditures on services as varied as education, retraining and pensions become unstable. Without these coalitions, foreign direct investment, lured by tax breaks or incentives, becomes a crucial strategy in providing tax revenues for developing countries (Avi-Yonah, 2000). These revenues rarely have a large impact on national income; however, as multiple countries compete for foreign investment by decreasing tax rates and increasing subsidies. If developing countries are unable to tax businesses and lack political coalitions, they will be limited in their proscriptions for policies that favour welfare spending and worker training.

One example of these differences is the varied experiences with pension plans in different regions in the world. The US Social Security system has been operating for more than 70 years. It currently covers most workers and provides a benefit that lifts many elderly persons out of poverty. Each effort to privatize Social Security in order to "save" the system and increase returns to constituents has met with strong resistance from constituencies such as labour and elderly interest groups, who were able to prevent any radical changes. The experience of Chile's Social Security privatization was much different. Chile's privatized pension program was created under the direction of a non-democratically elected public official (Barrientos, 1996). Whereas the previous pension program covered around 70 per cent of the population before the change, by the mid 1990s, only a little over 50 per cent of the population was covered (Armijo and Faucher, 2002). Though Chile's program served broad sections of the population, the lack of democratic influence meant that constituencies would not be able to turn their preferences into meaningful political action. Despite these problems, Chile has been regarded by the World Bank as a policy innovator in pension programs and seen as a responsible global actor showing fiscal responsibility (World Bank, 1994). Democratic politics, international organizations and global markets all influence state policy, but no teleological understanding of globalization can stand up to the chaotic interplay of these factors.

Rather than globalization creating one alternative for ageing and globalization, there are specific global roles for different countries, dependent on their levels of labour and capital. The general ideas of globalization may be universal, but the ability to enact changes associated with it will be varied. Consequently, the rhetoric of globalization and the presence of international organizations such as the WTO and World Bank provide the framework to define social and economic goals, even if the exact conditions of globalization cannot be met. For ageing workers, this means adjusting to changing economic conditions that contextualize life course goals dynamically. Static expectations about work and retirement are transformed by a country's changing place on the international division of labour and its present contribution to the global marketplace.

If developing countries transport their younger working populations to foreign countries, they are left with different options for the funding of potential social programs and the treatment of aged workers. Instead of programs that are built around government transfers of funds and organized by government bureaucracies, families and informal networks will become responsible for the care and opportunities afforded to the aged. As mentioned earlier, these arrangements may also disrupt traditional generational arrangements that surround care giving. As a result, the aged may be caring for children and engaging in unpaid work that allows their children to immigrate but that also places restrictions on their work opportunities.

Conclusion: localizing globalization narratives

Much of the conflict over the effects of globalization concerns disagreements about where to look for evidence of globalization's benefits or shortcomings. Where some theorists see the dislocation of traditional economies, others emphasize integration into the world market. Defining globalization as cultural imperialism or economic progress becomes nearly impossible, as theorists use different indicators to make their arguments. There is no simple way to measure the encroachment of a global market on the "lifeworld" of local communities or the potential advantages gained by restructuring. At stake as well is the legitimacy of certain actors to define their own economic and cultural circumstances. Public policies influence identities and opportunities for self-actualization, making the consequences of changing moral and political economies even more critical (Hendricks, 2004). We are left with a difficult question, how can democratic and local control of markets and lives be respected when the global market exists beyond the reach of any one political unit?

Responding to the soft paternalism found in many interpretations of globalization, commentators argue that the changes wrought by globalization should be judged by the communities they affect. The key issue, then, is whether localities have some say in their fate. If local communities are not given alternatives, their voice is potentially lost, increasing opportunities for exploitation. Additionally, governments that do not share the same goals as the population may underestimate support for globalization policies. Many times, this creates a backlash that makes governments less likely to restructure economies than incremental progress that is taken more slowly but strengthened by democratic consent.

The experience of ageing workers is very similar to this account. Aged workers are at risk of being left out of the globalization debate. Although they are often depicted as a drain on resources or able to work, aged workers are much more diverse with differing levels of ability based on prior life chances. Increasingly, at stake in discussions about globalization is the legitimacy of smaller narratives about life and community vs larger narratives like globalization that tend to subsume these choices under the umbrella of market capitalism and an integrated global economy. Fundamental definitions of the welfare state, investment and globalization will rely on creating life course opportunities and expectations that may centre on the elderly but affect all citizens. The aged and the framing of modern government expenditures have been irrevocably linked. It will be difficult to include the narratives of all possible actors and groups of actors into a discussion of globalization, but disaggregating the effects of globalization into smaller units allows for a more complete understanding of its long-term effects.

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