

## 1. 就業希望と就業実現の間にある障壁：雇用不継続者予備軍が抱える問題

60歳以降も働くか否かについての意思決定には、本人の意識の持ちようが強く反映される。たとえば職場でリストラといった、従業員たちに負の感情を抱かせるような施策が行われた場合、組織との信頼関係に高年齢従業員たちは疑念を持ち始め、働き続けたいという意欲自体を失うことになる。特に現企業のみならず現企業以外での就業意欲さえも失わせていることが注目される。また現企業および現企業以外での就業実現可能性も低いと考え、働き続けることに関して自信を喪失していることがうかがえる。企業の施策によって、60歳以降の就業意欲と自信が全体的に減退させられることがあるということに、注意を払う必要があるだろう。そして多くの人が、これまでと同じ仕事に従事し、体得してきた知識や技能を活かして働きたいと考えていることに着目する必要がある。

また本稿は、60歳以降の就業を希望する全ての人がその希望を実現できるわけではない中で、就業希望を持つことと、実際に雇用されることとの間にある障壁が何であるのかを明らかにすることを目的として分析を行ってきた。この点について、まずひとつの障壁は、労働供給側の家庭事情を背景とする自発的判断にあり、それ以外の障壁は、本人の人的資源としての特性に関する自己診断にあるとの見解に至った。

労働供給側の自発的判断として、就業は難しいと考えるに至る理由のひとつは、介護が必要な家族がいるという家庭事情にある。高齢社会においては介護に従事する人も必要である。しかし本当は働き続けたいのに、介護ゆえに就業を諦めなければならないと本人が思っているとすれば、雇用促進政策という視点からも、政府は介護の問題について何らかの施策を講じていくことが必要となろう。

それ以外の障壁は、全て本人の人的資源としての特性に係わるものである。まず組織とのつながりが強いという、いわゆる所属組織への忠誠心と、組織への一体化行動は、実際の就業実現に有効なわけではない。良好な人間関係や職場との一体感だけでは、60歳以降の就業を実現できるわけではないといえる。また収入獲得や健康維持といった個人的理由を持っていても、実際の就業実現には有意な影響を持っていないことが示された。つまり労働需要側である企業にとって、当該者が持つ組織に対する思いや個人的問題は、雇用継続者を選定する上であまり関係がないといえるだろう。

また雇用と不雇用とを分かつ人的資源としての特徴として、本分析では、本人が持つ職業人としての職務能力がどのようなものであるかという点が浮かび上がった。職業タイプとしてジェネラリストとされる人のほうが60歳以降の雇用継続を希望する傾向が強い。しかし実際に就業実現可能性が高いと考えられているのは、スペシャリストや職人タイプと目される人々であり、このことは、担当職能に関する高い職務能力を持つ人材が雇用されやすいことを、高年齢従業員自身が認識していることを意味している。したがって、特定分野や担当職能に関する高い職務能力を体得しているか否かが雇用・不雇用を分かつひとつの重要な分

岐点となっていると指摘できる。

また唯一、現企業の就業を実現できると思っている人だけが、高年齢者雇用安定法改正によって 60 歳以降の雇用可能性に関する認識を持ち、また老後の生活設計もきちんと立て、公的年金の受給額を把握し、計画的で堅実な経済生活を送っていることがわかった。単に 60 歳以降の就業を希望している人たちや、現企業以外での就業実現可能性があると考えている人たちにはこのような傾向は見られなかった。他企業等での就業が現企業での雇用継続よりも難しい現状を考えると、現企業で就業実現可能性ありと考えている人々が、実際に 60 歳以降の雇用を確実に実現し、60 歳以上の雇用労働者の多くを占めていく存在になっていくことを考えると、この特性は注目すべき点である。雇用・不雇用を分かち重要なもうひとつの分岐点は、実は定年時に存在しているのではなく、定年に到達するまでの長きにわたる職業キャリアをどれだけ計画的に堅実に歩んできているか、またそうした志向性を持っているかという問題に帰結しているものと考えられる。

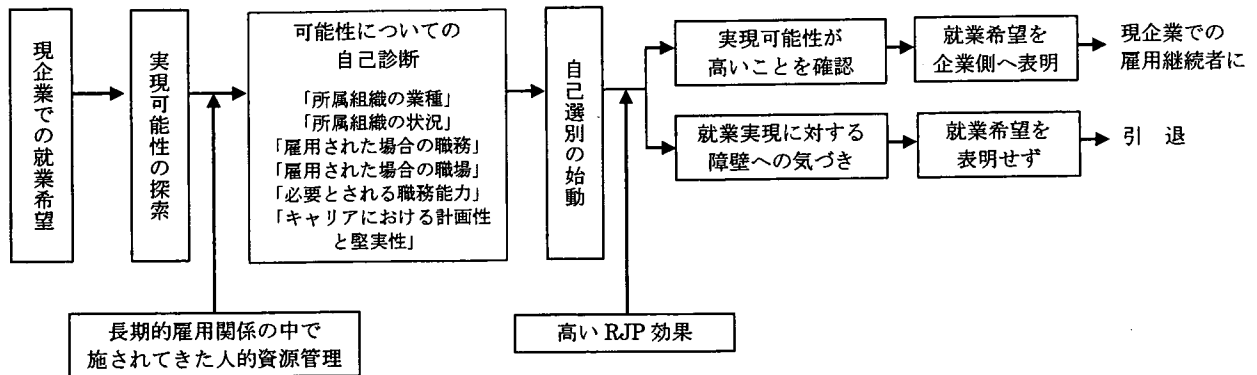
## 2. 自己選別はなぜ始動されるのか

それではなぜ当該者たちは、上述の雇用・不雇用の分岐点を知ることができるのだろうか。この分かれ目を認識しているからこそ、就業希望者と就業実現可能と考えている人たちの間には異なる分析結果が表れているのであろう。この点について、まず前出の基本統計量の第 2-5-3 表 (①~③) を見ると、就業希望者も就業を実現可能と考えている人たちも、ともに勤続年数が長いことがわかる。全サンプルで勤続年数は平均 26.24 年となっており、60 歳以降就業希望者で 26.01 年、現企業就業希望者で 24.83 年、現企業以外希望者で 27.78 年となっており、いずれも長期勤続者である場合が多い。

この勤続年数の長さから推測できることは、高年齢従業員たちは長きにわたって現企業で勤めあげてきた中で、その組織が実施する人的資源管理を受け、他の同僚たちの様子もよくわかっており、この企業ではどのような人材が評価され、雇用され続ける可能性が高いのかを自ずと認識しているということである。したがって、その企業の評価基準と自分の状況とを照らし合わせて、60 歳以降の雇用可能性を事前に診断することが可能となっていると考えられる。このように、組織内における自分の立ち位置をある程度正確に認識できるのは、その組織に長く勤務し、そこで一貫した人的資源管理を施され、長期に亘って企業内部の状況を見てきているからこそといえるだろう。

一般的にいつて定年後の雇用継続は、ここで見てきたように、企業側による選抜より前に、定年後の就業に関して本人が就業希望を持っていることが前提となる。そのため雇用継続者の決定において、まず当該定年到達者による選択 (self-selection) の問題が先立つことになる。その意味で、定年後の雇用継続者の組織への再入職プロセスは、新人が組織の入り口に立ち、入職が決定されていくプロセスと本質的に似ている。この入り口管理 (entry management) において、Wanous (1992) は「RJP (realistic job preview : 職務について

第2-7-1図 自己選別のプロセス



の現実的な予告)」の重要性を指摘している。入職者が当該組織や従事する職務に関して事前に情報を得て、正しいリアリティをもって入職を決めた場合に、良好なマッチングが実現され、無邪気な期待 (naive expectations) を抱いて入職してくる人たちよりも、職務満足、業績、定着率が高まるという。

おそらく高年齢従業員は長期にわたって企業内部の状況をよく見てきている分だけ、一般的な新卒者よりも当該企業について詳細に把握している。よって雇用継続された場合に従事する職務や職場環境をよく認識できていると同時に、その組織において雇用継続される場合に、自分にとって障壁となっているものが何であるのかについても発見しやすい。つまり上述してきたような人的資源としての要素を自分が持っていない場合には、たとえ就業が実現できたとしても、望まれて雇用されているわけではないために、希望通りの働き方や尊厳のある働き方ができない可能性がある。定年前の従業員たちはこのことを予見したならば、本来的には就業希望を持っていたとしても、その希望を企業側に表明することなく引退していく可能性が高い。そのような雇用・不雇用に関する事前の自己診断が行われていくプロセスを図示するならば、第2-7-1図のようになろう。

まず現企業での就業希望者は、その実現可能性について探索を始める。これまで長期にわたって受けてきた人的資源管理を通じて、企業の状況や企業の評価基準に基づいてあらゆる項目について自己診断をしていく。そして高いRJP効果をもって、自己選別が自動的に始動されていく。その結果、実現可能性が高いことを確認した場合には就業希望を企業側に表明し、最終的には雇用継続者となっていく。他方、就業実現との間にある障壁に気づいたならば、就業希望を持っていようともそれを表明せず、最終的には引退していくことになる。無論、企業側から表立った選別を受けることもあろう。しかし第4節の第2-4-4図で確認したように、就業実現が難しいと考える人々の多くは、このような自己選別のプロセスを経てそのことを認識し、雇用・不雇用が確定されていくものと考えられる。

### 3. 現企業以外での就業は本当に思ったとおりに実現されるのか

上記は現企業での雇用継続の場合である。現企業以外での就業を実現する場合はどうか。まず本稿の結果が、本人の認識によるものであり、現企業での雇用継続の場合もそうであるが、就業を実現できると本人は思っている、実際には「思い違い」の可能性もあるということ念頭にしなければならぬ。例えば転職を3回以上経験している人が、本当に高年齢期の転職をうまく実現できる人なのであろうか。第3節で見てきたように、高年齢従業員の転職意識は低く、自ら社外ネットワークを築き、その誘引力によって転職していく例は少ない。そのため高年齢期の転職は、従前の企業の支援によって、従前企業となんらかの取引や人的つながりがある企業へと移動していく場合が多いと考えられる。つまり高年齢期での転職の成功は、Granovetter のいう弱い紐帯 (weak-tie) ではなく、企業との強い紐帯 (strong-tie) を利用したものが多くと考えられる。この場合、企業との強い紐帯関係を利用できるのは、おそらく長きにわたって当該企業で勤め上げ、企業との関係を深めてきた者であろう。

また同じく第3節で見てきたように、企業側は高年齢転職者に「職能の専門能力」や「管理・折衝能力」を期待しているが、転職が多く、4つ以上の企業を転々とし、多くの職能を渡ってきた者が、特定分野における高い職務能力を形成できるとはあまり考えられない。職務能力を格段に引き上げる働き方は、担当職能に特化して仕事経験を積んでいくことであり、特に企業の中心的な仕事に深く関わりながら、それを行うことである。短期間しかその職場で働いていない者は、企業の中心的な仕事に係わることは稀であり、概して周辺的な仕事か、中心的な仕事の一部にしか係わることはできないであろう。そうした人々は新しい職場に適合する能力には秀でていないかもしれない。しかししっかりと腰を添えて、着実に特定分野に関する職務能力を高めていくことはむしろ難しいと予想される。企業との長期的な関係の中で強い紐帯を利用できる人や、じっくりと高度な職務能力を体得できた人が、他企業への転職の場合も、また独立創業をする場合でも有利な可能性は否定できないであろう。

### 4. 多くの人々が雇用継続を選択し実際に雇用されるためには、どのような施策が必要なのか

本稿は、60歳以降の就業において、雇用・不雇用の選抜は不可避であるとの議論から始まった。しかし前述のような自己選別が始動されるとしても、将来的には現在よりも多くの人々が就業の実現可能性が高いという診断に至り、また多くの人々の就業希望が叶えられていくことが望ましい。そのためにはどのような視点、あるいは施策が必要なのだろうか。

まず企業の人的資源管理として、60歳を超えても必要とされ続ける人材を多く育成していくことが大切である。特定分野や担当職能についての仕事経験を蓄積し、高い職務能力を体得した人材を育成していくことは、単に高年齢者の就労促進のためだけに有効なのではない。高年齢期になっても雇用し続けたいと思うような有能な人材は、間違いなく企業の発展に貢

献していく人材である。そのような人材の育成のためには、本分析で見てきたように、単に長期勤続者で職場とのつながりが強いというだけではだめで、企業と従業員間の長期安定的な雇用関係の中で、一貫性のある人的資源管理を施し、その中で計画的、意図的に従業員一人ひとりの能力育成を行っていくことが求められる。

また企業は従業員に対して、長期的観点で自身の職業人生と老後を含む経済生活について、設計図を描いていくことを促していくことも必要である。具体的施策として、生涯生活設計セミナーや退職準備プログラム、キャリアカウンセリングなどをキャリアの節目節目で行っていくということがあるだろう。しかし「JILPT 企業調査 (2006)」によると、これらの施策を実施している企業は少なく、僅かに 17.2%に留まっている。従業員たちはこれらの施策を通じて、自身の能力の棚卸しを行い、これまでの職業人生を振り返り、またこれからの職業人生を展望し、60 歳以降も働きたいという希望を実現するために何が必要なのかを考え、また 60 歳以降の就業も視野に入れた人生設計を描いていくであろう。そのための具体的機会をつくっていく必要があるだろう。

そして本分析では、たとえばリストラのような、従業員たちに負の感情を抱かせるような施策が行われた場合、組織との信頼関係に高年齢従業員たちは疑念を持ち始め、60 歳以降の就業意欲が全体的に減退させられることがわかった。企業が行う各種の人事施策は、そうした副次的効果を含め、実に様々な影響を及ぼすものである。そのことに注意が必要である。一つひとつの人事施策に揺れ動く従業員心理を念頭に入れた人的資源管理を行っていくことが求められている。

60 歳以降の就業は、これまでの職業キャリアの延長線上にあるのであり、雇用・不雇用の分岐点は、実は定年時にあるのではない。これまでの仕事経験や職業上の様々な経験の中で、徐々に分岐点の根幹となる要素が自身の中で形成されていくのである。したがって、60 歳以降の就労促進のために、企業の人的資源管理に求められる視点は、定年前後の雇用管理だけでなく、入社から定年時に至る従業員一人ひとりのキャリア全体に目配りをしていくことにある。2030 年には団塊世代の子供たちが 60 歳を迎え始めるが、将来にわたって高年齢者雇用を促進していく施策を展望していくことが今求められている。

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**Structural Reform of the Workforce in Ageing Society:  
In What Type of Career Have Elderly Workers in Japan Been Employed? \***

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With its population having declined from 2006, Japan has become the most aged country in the world. The Japanese labour market needs a new source of labour, and elderly people in particular are attracting attention as a focus of hope in this regard. However, companies find it difficult to employ elderly people because of a mismatch of the abilities required and those offered by the elderly. The current paper examines through career analysis what types of elderly people remain employed beyond the age of 60. Based on the examination, the paper clarifies the perspective necessary for companies in conducting human resource management in order to realize the employment of elderly people, and presents proposals concerning policy measures that should be implemented by the government.

**I. Current Status of Japan's Labour Market**

In many developed countries, the birthrate has been declining and the society has been ageing. Japan and Germany are no exceptions. If no countermeasure is taken, one problem that would be sure to arise due to the ageing of society would be a labour shortage.

In Japan, the national population had been declining in 2006, with one in three people aged 60 or older and more than 20% of the population aged 65 or older. According to an estimate by the Ministry of Health, Labour and Welfare, if the level of the participation of young people, women and elderly people in the labour market remains low, Japan's labour force will decrease by 2030 by around 10 million people from the current level. On the other hand, there is an argument that if a labour shortage arises in the future, people who are now unemployed will be automatically absorbed by the labour market and young people, women and elderly people who are potentially willing to work will also enter the labour market, thus easing the crisis of labour shortage.

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However, if we take account of problems faced by young people, women and the elderly as explained below, we must come to the conclusion that the status of the labour market is too severe to justify such an argument.

#### A. Current Labour Status of Young People

In Japan, the unemployment rate for young people remains high, and the government has implemented a variety of measures to support the employment of the young. The unemployment rate for young people declined to 8.7% in 2005 from 10.1% in 2003, making it appear on the surface as if the labour market environment has improved. However, a Cabinet Office report showed that the number of "NEET" (not in education, employment, or training) people climbed to 850,000 in 2005 from an estimated 640,000 in 2003. People who are not working are counted among the unemployed as long as they are looking for a job. However, an increasing number of young people neither engage in even non-regular work such as part-time work nor look for a job. Many of such people, even if they are adults on the basis of age, live as family "parasites," depending entirely on their parents financially. Not that there are no job offers available for such people. The effective ratio of job offers to job seekers has been rising, with some industries already suffering from labour shortage, and companies are actively recruiting workers. Nonetheless, many young people choose to remain jobless.

The labour market conditions in Japan as described above are very similar to those seen in Germany after the country's social policy approach of the 1980s ended in failure. The German government encouraged early retirement by offering generous employment insurance benefits to elderly workers. In addition, it attempted to curb a rise in the unemployment rate for young people by providing subsidies for the employment of the young so as to replace elderly workers with a young workforce. However, early retirement of elderly people facilitated by this approach served only to squeeze the finances of the employment insurance and pension systems while the approach failed to improve the unemployment rate for the young.

This episode indicates that the fundamental reason for the high unemployment rate for young people and their decision to remain jobless is not a lack of labour demand. Young people are refusing to work despite companies' efforts to offer increased employment opportunities and the government's support for their employment. Young people's absence from the labour market probably results from their weak work consciousness. Judging from the experiences of Germany, it is expected to take a considerable amount of time and effort to change young people's work consciousness.



## B. Current Labour Status of Women

From the 1980s through the 1990s, the ratio of women to the total workforce continued to rise and exceeded 50%. After the year 2000, however, it began to decline, with the ratio in 2005 falling back to the level of the early 1980s. The decline of the ratio of female workers is connected to the revival of a social tendency to think that marriage and child care should be the priorities of women, which reflects efforts to improve the slumping birthrate. Against this background, the use of the terms “KACHI-GUMI (winners’ group)” and “(MAKE-GUMI) losers’ group” to classify women has become fashionable.

The “winners” as used this way refer not to socially successful people in the conventional sense but to women who get married with men earning stable income and become mothers. Although the Cabinet Office is promoting gender equality, it is difficult for women to achieve an appropriate work-life balance in Japan’s working society. Therefore, when women get married and become mothers, it implies in many cases in Japan that they should abandon their jobs. Both their workplace and family want them to stop working and concentrate on domestic affairs.

In Japan recently, housewives, rather than women with excellent academic backgrounds and high social status, tend to be regarded as a socially successful category. The revival of this kind of old-fashioned sense of value and customs is likely to continue for a while. This means that many Japanese women are focusing their attention on family, rather than on the labour market.

## C. Current Labour Status of Elderly People

Elderly people in Japan have strong willingness to work. More than 80% of people in their late 50s are willing to work after turning 60, according to various surveys.<sup>1</sup> As the first baby boomer generation (born in 1947) reaches the mandatory retirement age of 60 in 2007, Japanese companies need to increase efforts to employ elderly people. After the revised Law Concerning Stabilization of Employment of Elderly Persons came into force in April 2006, the ratio of companies adopting a system to offer continued employment to workers beyond the mandatory retirement age exceeded 90%. Despite the widespread adoption of such a system, however, the employment of elderly people has not increased substantially in practice. There are two major options for elderly people wishing to continue to work after reaching the mandatory retirement age. One is to continue

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<sup>1</sup> The ratio of such people willing to work is 88.5% according to the most recent data (Japan Institute of Labour Policy and Training, 2007) (excluding no replies). In Japan, where most companies adopt the mandatory retirement age of 60, the employment of “elderly people” refers to the employment of people aged 60 or older.

working at the same company and the other is to move to another company. Roughly speaking, one in three employees who reach the mandatory retirement age remains employed at the same company, while only one in ten succeeds in moving to another company.

As mentioned above, some companies are beginning to suffer from labour shortage, while elderly people have strong willingness to work. Why then does the employment of elderly people make little progress? Regarding this issue, preceding studies have shown that there is a gap between the abilities desired by companies and those that can be offered by elderly people and that this gap serves as a major obstacle to the employment of the elderly (Association of Employment Development for Senior Citizens, 1998a ; policy research department at Labour Minister's Secretariat, 2000 ; Fujimura, 2001 ; Fujimura and Matsumura, 2001; Japan Organization for Employment of the Elderly and Persons with Disabilities, 2005). Companies should satisfy the social need for an expansion of the employment of elderly people, indeed. However, they must also pursue economy in order to maintain and develop their organization. Therefore, it is quite natural for companies to behave in ways to retain only necessary personnel as part of their business resources.

As explained above, Japan's labour market needs new workers amid a decrease in the labour force due to the slumping birthrate and the ageing of society, fueling hopes that more young people, women and elderly people will join the country's workforce. These groups of workers face problems of their own. However, in light of their respective levels of willingness to work and the strength of the legal framework for the employment of these groups, promoting the employment of elderly people is the most likely to produce successful effects. Hereafter, the current paper focuses on the promotion of the employment of elderly people.

## **II. What Types of Elderly People Are Retained as Employees**

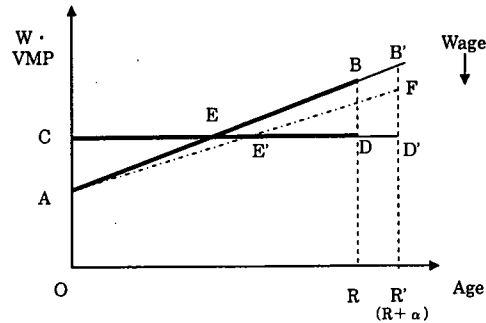
### **A. How Employment of Elderly People Can be Secured: Findings of Preceding Studies**

Regarding the above question, it has been argued that the way personnel management is conducted by Japanese companies is preventing an expansion of the employment of elderly people, with the seniority-based wage system in particular constituting the greatest obstacle. Seike (1998, 2000), for example, made such an argument based on Lazear's theory.<sup>2</sup>

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<sup>2</sup> Lazear's model takes account of post-retirement factors such as retirement allowances and corporate pension benefits as well as opportunity costs. However, these factors are excluded here for the purpose of model simplification.

Figure 1: Condition of the employment of elderly people (employment extension of  $\alpha$  years) as deduced from Lazear's model



Source : Adapted from Lazear, Edward P., "Why is There Mandatory Retirement?" *Journal of Political Economy*, Vol.87 No.6, 1979, pp.1261-1284. (A model modified by Seike (1998, 2000) is used.)

According to Lazear's theory (1979), as a way to retain employees, companies set wages for a worker at a level less than the VMP (value of the worker's marginal product: equivalent to the worker's contribution to the company) when he/she is young, and set the wage at a level higher than the VMP when he/she grows older, so as to allow him/her to recover the early shortfall. Under the seniority-based wage system, which thus seeks to balance out wage payments over the long term, companies at some point face a need to force employees to retire (mandatory retirement or administrative retirement), resulting in the practice of a mandatory retirement age system in order to maintain the balance. This has resulted in the practice of fixed-age mandatory retirement.

In Figure 1, the bold line AB represents the level of wages paid and the bold line CD represents the VMP. The point R, which represents the mandatory retirement age, is located so as to make the area OABR, which represents the total amount of wages paid, and the area OCDR, which represents the total VMP, equal in size to each other. If this is to be used as the base model, an employment extension of  $\alpha$  years, or the transfer of the point R to R' ( $R + \alpha$ ) can be realized by making the gradient of the line AB, which represents the seniority-based wages, as moderate as the gradient of the line AF regarding which the area OAFR' is equal in size to the area OCD'R'. The conclusion is that the introduction of a system of paying wages based on the VMP to a certain degree, namely the performance-based wage system, will make it possible for companies to continue employing workers after they reach the mandatory retirement age.

The problem is, however, that although the theoretical promise of this system was shown, no corroborating evidence has been provided. The performance-based personnel management system, which links pay to ongoing performance, may shift emphasis in

the handling of the employer-worker relationship from a long-term perspective to a short-term one. Empirical analysis has not been conducted as to whether this kind of personnel management system promotes the employment of elderly people. The current paper seeks to empirically examine from which perspective companies should conduct human resource management in order to realize the employment of the elderly, by investigating what types of elderly people secure employment after reaching the mandatory retirement age, based on the analysis of their working careers.

#### **B. What Types of Elderly People Are Employed? : Hypothesis**

As explained earlier, companies have an incentive for seeking to employ only necessary personnel. Particularly in Japan, where strict limits are placed on dismissal of employees and job security is highly valued, companies resist the temptation of employing any worker available even in the event of a labour shortage. Then, what types of workers do companies seek to employ? One answer to this question is that companies pick workers who are useful for them, since they are economic organizations that pursue profits. What types of workers are useful for companies? Regarding this question, there are general theories accepted by researchers on labour issues.

A theory concerning the abilities of workers first emerged when Robert Katz advocated debate on abilities to “analyze complex phenomena,” foresee change” and “identify ways to deal with problems”, which are known as “conceptual skills.” In Japan, Koike (1991, 1997) formulated a theory concerning the abilities of workers in his publications. Koike argued that the “ability to deal with uncertainty” is most important for performing jobs, adding that for a worker to acquire this ability, it is necessary for him/her to undergo position transfers in ways to experience a broad range of tasks within the same function. Even if such position transfers are limited to a specific field, positions assigned may include ones at various locations within the company, including a business office, a factory and a branch, according to Koike’s theory. Meanwhile, based on detailed career profile analysis, Nakamura (1991) showed that a career focused on a specific function is important not only for factory jobs but also for clerical and administrative jobs, thereby rejecting the widely accepted theory that generalists who can perform various functions are suitable for white-collar jobs. Inoki (2002) pointed out that although workers must acquire expertise in a specific field in order to perform tasks requiring flexibility, what this means is not that their functions may be limited to a narrow field but that their functions must have a certain depth and range.

The conclusion drawn from the above-mentioned theories is that workers useful for companies are people capable of performing tasks requiring flexibility and dealing with

uncertain situations, and that in order to acquire such ability, workers need to have a certain depth and range of experiences in a specific field. Such worker characteristics are likely to be used as a major benchmark for companies when deciding whether or not to employ elderly workers. Therefore, the following proposition may be presented as a hypothesis concerning the type of career that is likely to enable workers to remain employed after reaching the mandatory retirement age:

For elderly workers to remain employed, it is important to acquire job abilities regarded as useful for companies. In order to acquire such abilities, it is necessary to gain experiences over a long period of time within the same function.

According to this hypothesis, gaining experiences over a long period of time within the same function is expected to be more important than working for the same company for many years, obtaining a position on the basis of vague analysis of job performance or capability evaluation or acquiring qualifications as part of off-the-job training.

### C. Analysis Method

Data used for the analysis were collected from personnel information concerning people who were retained as employees after reaching the mandatory retirement age at Case Company A (an industrial equipment manufacturer, founded more than 80 years ago, that has a workforce of about 5,000 on a non-consolidated basis and about 20,000 on a consolidated basis) and those who were not retained, as well as employees who managed to move to other companies around the time of mandatory retirement and those who failed to do so. For the analysis of employees who were retained, data on 80 employees who reached the mandatory retirement age at Company A in September 2001 were used. For the analysis of employees who managed to move to other companies, a total of 90 people, including elderly workers who moved to other companies by taking advantage of a "second life" support program between October 1995 and March 2003 and workers who were relocated on loan to other companies that have no capital ties with Company A between April 1990 and October 2002 and reached the mandatory retirement age there<sup>3</sup>.

Using sample groups from a single company is useful because 1) the kind of reliable and detailed personnel information that could not be collected through surveys on randomly selected workers can be obtained and 2) it is possible to control various factors

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<sup>3</sup> As it is very difficult for workers to move to other companies after growing old, the number of workers who actually do so is small. In many cases, workers who move to other companies near the time of the mandatory retirement do so by taking advantage of company-sponsored schemes.

Table 1: Basic statistical table

Variables		Continued employment						Move to other companies					
		All samples		Success		Failure		All samples		Success		Failure	
		Average	Standard error	Average	Standard error	Average	Standard error	Average	Standard error	Average	Standard error	Average	Standard error
Explained variables	Continued employment=success	77.5%	0.420	—	—	—	—	—	—	—	—	—	—
	Move to other companies= success	—	—	—	—	—	—	71.1%	0.455	—	—	—	—
Explanatory variables													
Individual attributes	Gender = male	94.0%	0.240	94.0%	0.260	94.0%	0.240	98.9%	0.105	98.4%	0.125	100.0%	0
	Academic background = university graduate	20.0%	0.402	20.9%	0.410	16.6%	0.383	55.6%	0.499	59.4%	0.495	46.2%	0.508
	Health condition = good	86.0%	0.350	94.0%	0.260	61.0%	0.500	—	—	—	—	—	—
	No. of dependents needing nursing care	0.16	0.390	0.16	0.410	0.11	0.320	0.21	0.410	0.23	0.427	0.15	0.357
Job conditions	Years of engagement	37.34	7.852	38.35	6.369	33.86	11.154	30.66	6.167	36.63	6.696	36.73	4.686
	Years of experience in same function	32.10	10.655	33.88	9.397	25.94	12.609	31.96	9.366	33.97	8.265	27.00	10.209
	Experience of turnover = have experience	—	—	—	—	—	—	15.6%	0.364	12.6%	0.333	23.1%	0.429
	Professional status = managerial posts	36.2%	0.483	45.1%	0.501	55.5%	0.235	98.9%	1.116	92.2%	0.270	76.9%	0.429
	Occupational qualification	1.97	2.700	2.19	2.960	1.22	1.350	2.74	3.511	3.08	3.696	1.92	2.911
	Language skills	1.81	1.080	1.90	1.080	1.50	1.040	2.60	1.459	2.65	1.424	2.73	1.563
	Attendance situation = good	78.7%	0.411	88.7%	0.319	44.4%	0.511	—	—	—	—	—	—
	Type of occupation = factory worker	51.2%	0.503	50.0%	0.504	65.5%	0.511	32.2%	0.469	35.9%	0.463	23.1%	0.429
	Type of occupation = office worker	38.7%	0.490	38.7%	0.491	38.8%	0.501	50.0%	0.502	51.6%	0.503	46.2%	0.508
Economic conditions	Commuting time = less than one hour	63.0%	0.490	65.0%	0.480	66.0%	0.510	66.7%	0.498	54.7%	0.501	61.5%	0.496
	No. of co-residents	2.45	1.230	2.44	1.220	2.50	1.290	2.80	1.201	2.85	1.046	2.62	1.525
	No. of children to support	0.16	0.400	0.16	0.410	0.17	0.380	0.38	0.680	0.43	0.709	0.23	0.587
	Housing loan = borrowing loan	15.0%	0.380	13.0%	0.340	22.0%	0.430	—	—	—	—	—	—
Number of samples		80		62		18		90		64		26	

Data Source: Compiled based on internal documents of Company A and interview surveys

that may affect the analysis results, such as the company size, business type, business condition, the company age, the presence or absence of a labour union and the status of a system for the employment of elderly people.

#### D. Data Compilation

The basic statistical quantity of variables used in the analysis is as shown in Table 1. Explained below is how statistical data concerning the 80 workers retained and the 90 workers who moved to other companies were compiled.

A worker's success or failure regarding "continued employment," which serves as an explained variable in the analysis, was determined based on the worker's response to an opinion survey concerning employment and work after the mandatory retirement age, which is conducted on workers six months before they reach that age. Employees who have not by then been asked by the company to continue working can be regarded as having failed to remain employed after reaching the mandatory retirement age. Success or failure of a worker's attempt to move to another company, which also serves as an explained variable, was determined based on a follow-up report compiled by the personnel division with regard to the status of employees who moved to other companies. Regarding employees who were relocated on loan to other companies, success or failure was determined by reference to the list of such employees, which notes whether they were retained or not by those companies after reaching the mandatory retirement age.

As for explanatory variables, necessary data were collected from the 11 items of information contained in Company A's personnel information files, namely "current status," "pre-employment career," "qualifications/special skills," "intra-company career,"

“history of work assignments,” “records on training,” “history of relocation on loan to other companies,” “attendance records,” “self-promotional message” and “family status.” The variable items used in this analysis were selected by reference to preceding studies concerning career analysis. The items include individual attributes such as “gender,” “academic background,” “health condition” and “the number of dependents requiring nursing care,” job conditions such as “years of engagement,” “years of experience in the same function,” “experiences of turnover,” “professional status: managerial posts,” “occupational qualification,” “language skills,” “attendance situation” and “type of occupation” and economic conditions such as the commuting time, “the number of co-residents,” “the number of children to support” and “the housing loan status.”

“Years of experience in the same function” refers to the time duration during which a worker engaged in the same function after joining the company. In the case of a factory worker, the duration ends when the worker moves to another job within the same division or moves to another division in order to engage in another function. In the case of an office worker, the duration ends when the worker is relocated to engage in a different function. The “function” refers to the set of tasks for which a worker is responsible. For example, functions, as opposed to jobs, include production, sales, R&D and personnel and labour management, while jobs include assembly, inspection, and painting. A worker’s years of experience in the same function were determined based on personnel information concerning the intra-company career.

In the case of employees who have moved to other companies, there was no data available with regard to “health condition,” which was determined in light of the number of sick days left, and “attendance situation,” which was determined in light of the number of unused paid holidays, as such data are updated every three months. There was no information available with regard to “housing loans status,” either. Therefore, these items are excluded from the career analysis of employees who have moved to other companies. Regarding “experience of turnover,” preceding studies have indicated the possibility that such experience may affect the success or failure of an attempt by elderly workers to move to other companies. Therefore, this item was used as a variable only in the career analysis of employees who have moved to other companies (Association of Employment Development for Senior Citizen, 1998b ; Chuma and CAPLAN Research Group, 2003).

The analysis was conducted with the logistic regression analysis method with the use of dummy variables. Dummy variable “1” indicates success of an attempt to move to another company and “0” indicates failure thereof.

Table 2: Results of analysis on "effect on continued employment intra-firm"

Independent Variable	Explained variable: continued employment = success							
	(1) Base model		(2) Plug in "economic conditions"		(3) Exclusive for "years of experience in same function"		(4) Exclusive for "years of engagement"	
	Coefficient	Standard error	Coefficient	Standard error	Coefficient	Standard error	Coefficient	Standard error
Conditions								
Years of engagement	-0.134	0.086	-0.205*	0.115	0.009	0.041	—	—
Years of experience in same function	0.192**	0.088	0.259**	0.121	—	—	0.085**	0.042
Professional status: managerial posts	10.933	29.505	13.409	45.871	8.792	34.153	9.327	32.880
Occupational qualification	0.002	0.216	-0.001	0.233	0.126	0.220	0.055	0.234
Language skills	0.161	0.448	0.097	0.545	0.043	0.474	-0.061	0.498
Attendance situation: favorable	2.284**	1.018	2.826**	1.227	2.061**	0.958	2.263**	1.036
Type of occupation: factory worker	6.447	29.453	7.409	45.796	7.670	34.170	6.649	32.888
Type of occupation: office worker	6.589	29.460	7.161	45.805	7.928	34.168	6.734	32.889
Constant term	-7.206	29.551	-8.209	45.865	-10.267	34.246	-10.432	32.949
Number of samples	80		80		80		80	
Chi-square	37.171**		40.984*		31.093*		35.726*	
Log likelihood	48.135		44.322		54.214		49.580	

Source: The internal document of a case company

Notes: 1) The analysis is logistic regression analysis. \*\*\*p<.01, \*\*p<.05, \*p<.10.

2) Results of "economic conditions" and "individual attribute" are omitted from this figure.

3) The reference group against "factory worker" and "office worker" is "administrative planning worker."

## E. Analysis Results

The results of the analysis of workers who remained employed after reaching the mandatory retirement age are as shown in Table 2. This table shows only the results concerning the job conditions that are important for the verification of our hypothesis<sup>4</sup>. Model (1), which excludes economic conditions, serves as the base model as companies are unlikely to make an employment decision concerning an elderly worker by taking account of the economic conditions of the worker, while economic conditions are plugged into Model (2). Models (3) and (4) exclude "years of experience in the same function" and "years of engagement," respectively, as explanatory variables. This is because these items were shown, as a result of the verification of the possibility of their collinearity, to have a medium-level co-relation of 0.559 at a significance level of 1%.

The analysis concerning Models (1) and (2) shows that the variables that have a positive effect on continued employment are "years of engagement," "years of experience in the same function" and "attendance situation." Particularly notable is that "years of experience in the same function" and "attendance situation" have a positive effect at a significance level of 5%, indicating that these items have a strong effect on the realization of continued employment. In relation to this, Table 1 shows that the average years of experience in the same function stood at 33.88 for workers who succeeded in securing continued employment and at 25.94 for those who failed, creating a wide gap between the results for these two groups of workers. There is also a gap between the two groups regarding "attendance situation," indicating that diligent workers tend to secure continued employment.

<sup>4</sup> Readers may inquire with the author for information concerning other variables. Please note that of the individual attributes and economic conditions used in this analysis, only "health condition" had a significant effect.



Table 3: Results of analysis on "effect on employment by moving to other company"

Explanatory Variable	Explained variable: employment by turnover = success					
	(1) Base model		(2) Plug in "economic conditions"		(3) Exclusive for "years of engagement"	
	Coefficient	Standard error	Coefficient	Standard error	Coefficient	Standard error
Job conditions						
Years of engagement	-0.106*	0.064	-0.104	0.065	—	—
Years of experience in same function	0.103***	0.039	0.102***	0.039	0.066**	0.030
Experience of turnover: have experience	-1.323*	0.769	-1.333*	0.799	-0.726	0.714
Professional status: managerial posts	1.406	0.886	1.388	0.893	1.367	0.848
Occupational qualification	0.048	0.087	0.047	0.089	0.053	0.086
Language skills	-0.036	0.223	-0.030	0.228	-0.016	0.223
Type of occupation: factory worker	0.451	0.854	0.468	0.855	0.757	0.832
Type of occupation: office worker	0.473	0.740	0.451	0.743	0.669	0.720
Constant term	4.948	22.373	4.939	22.374	2.293	22.299
Number of samples	90		90		90	
Chi-square	22.815**		23.011*		19.981*	
Log likelihood	85.393		85.197		88.226	

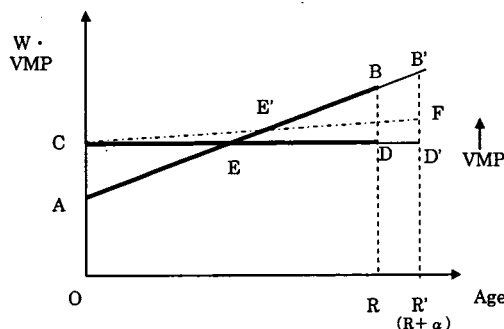
Source & Notes: Same as table 2

With regard to Model (2), "years of engagement" has a negative effect on the relation of continued employment at a significance level of 10%. Regarding Model (3), however, "years of engagement" has a positive effect, although the effect was not significant. From this, we can assume that although "years of engagement" is positively related to continued employment, the length of engagement alone will not ensure continued employment; the length of experience in the same function is the decisive factor. Furthermore, the analysis results for Model (4) show, like those for Model (2), that "years of experience in the same function" has a positive effect on the relation of continued employment at a significance level of 5% and that the log likelihood is smaller than in the case of Model (3), indicating that "years of experiences in the same function" is a more important factor for continued employment than "years of engagement."

Next, the results of the analysis of workers who moved to other companies are as shown in Table 3. As in the case above, Model (1), which excludes economic conditions, serves as the base model, while Model 2 factors in economic conditions. Model (3) excludes "years of engagement" as a variable, since this item has a medium-level co-relation of 0.527% with "years of experience in the same function" at a significance level of 1%. Meanwhile, a model that excluded "years of experience in the same function" was not included in this table as this model did not conform to available data (Model co-efficient verification : Chi-Square=15.229, p=0.293, Log likelihood=92.979).

The analysis results for Models (1) to (3) show that "years of engagement," "years of experience in the same function" and "experience of turnover" are variables that have a significant effect on the success of an attempt to move to other companies. "Years of experiences in the same function" has a particularly strong effect. This item has a positive effect at a significance level of 1% in the cases of Model (1) and (2) and at a significance level of 5% in the case of Model (3). Meanwhile, "years of engagement" is negatively related to the success of an attempt to move to another company and has a

Figure 2 : Possibility of Realization of Employment of Elderly People



negative effect at a significance level of 10% in the case of Model (1). This means that as in the case cited earlier, the length of experience in the same function alone will not have a positive effect on the success of an attempt to move to another company and that the length of experiences in the same function is the decisive factor. In addition, having the experience of turnover has a negative effect in the cases of Model (1) and (2) at a significance level of 10%. These results suggest that in order to gain experiences in the same function, it is effective to remain at the same company for a certain period of time, rather than turnover frequently.

#### F. Interpretation

From the above-mentioned analysis results, we can draw a conclusion as follows. The length of a worker's engagement with a company alone does not lead to successful results regardless of whether the worker is hoping to remain employed at the same company or to move to another company. What leads to success is gaining experiences in the same function over a long period of time. Meanwhile, gaining career experiences by turnover frequently does not necessarily enable workers to move to other companies after growing old. Furthermore, professional positions, qualifications, language skills and type of job have no particular effect on success or failure.

Preceding studies indicated, as a theoretical expectation, that elderly people will be employed if the performance-based wage system is introduced so as to reduce the wage profile gradient. However, some preceding surveys showed that a mismatch between the abilities desired by companies and those that can be offered by elderly workers has constituted a major obstacle to an expansion of the employment of the elderly. As shown in Figure 2, an employment extension of  $\alpha$  years, namely a continuation of employment beyond the mandatory retirement age, can be also realized by increasing the gradient of the line CD, which represents the value of the worker's marginal product (VMP).

Through the analysis shown above, the current paper has provided empirical evidence that in order to acquire job abilities regarded as useful for companies and to enhance the VMP (equivalent to the worker's contribution to the company), it is important to gain experiences in the same function over a long period of time, as our hypothesis stated. Such a working career is founded upon a long-term relationship with a single company. It can be assumed that the introduction of the performance-based personnel management system, which may end up handling the employer-worker relationship from a short-term perspective, poses the risk of disrupting workers' accumulation of experiences in the same function and, eventually, preventing them from enhancing their job abilities.

### III. Conclusion

The current paper empirically examined from which perspective companies should conduct human resource management in order to realize the employment of elderly people in particular, as elderly workers have emerged as a focus of hope amid the shrinkage of Japan's labour force due to the declining birthrate. Based on the analysis results, I would like to offer some comments.

Generally, speaking, I have the impression that securing continued employment at the same company, for which measures based on the organization principle are important, and moving to other companies, which is an action based on the market principle, have been handled as two separate matters that should be seen from fundamentally different perspectives. However, whether an employee may seek to remain at the same company or to move to another company, the important thing is that he/she should continue to have the kind of abilities needed by companies even after becoming old. The current paper has provided empirical evidence that such abilities are fostered through experiences gained in the same function over a long period of time.

So long as career management is left to the discretion of companies to a certain degree, a worker cannot build his/her own career, including in the near-retirement stage, or enhance his/her own abilities entirely through self efforts. In order to ensure the employment of elderly people, companies must take care not to disrupt the continuity of each worker's career by paying increased attention to personnel training throughout their entire career, starting right from the post-recruitment stage, as well as by paying heed to employment management of workers nearing the retirement age. A personnel management system based on a long-term perspective should constitute the foundation of such an approach. In efforts to expand the employment of elderly people, companies

have a significant role to play.

Regarding policy measures that may be implemented by the government, I would like to point out the following matters. If a short-term employer-worker relationship becomes the norm in the future, and the mobility of the labour market increases, we will face the difficult problem of who it is that should bear the cost of investment in training to be provided in the initial stage of the working career. A weakening of the existing capability training system that is based on the assumption of a long-term employer-worker relationship could in the future reduce the chance of elderly workers securing employment. Therefore, the government should recognize again the advantage of the Japanese style of management, rather than allowing the labour market to become more mobile. It is necessary to recognize again the importance of maintaining a labour environment in which companies and employees can conclude employment contracts from a long-term perspective. As a worker acquires job abilities as part of the career-building process, increased attention should be paid to this process. Providing administrative guidance and support so as to encourage companies to endeavor to employ regular workers based on the recognition of the importance of acquiring job abilities while working at companies will be more effective as a policy measure than enhancing public vocational training programs or providing generous subsidies for educational training.

Employees, for their part, should proactively involve themselves in the building of their own careers and take care to avoid disruptions of the process of acquiring job abilities. In order to exert their abilities to the full in specific fields, they should focus their attention on gaining work experiences in the same function and ensuring the consistency of their career by performing assigned tasks steadily, rather than on obtaining certified qualifications or acquiring generalist skills. To do so, they need to actively involve themselves in the building of their career right from the initial stage of the career, instead of taking action just before reaching the retirement age. They must recognize that building working careers this way will help not only to enhance job abilities in their fields of specialty but also to acquire broader abilities that would be needed when moving to other companies after becoming middle-aged or older.

It should be noted that research focusing on employment-related issues is starting to draw attention not only in Japan but also in Germany and other countries. In developed countries where the ageing of society is progressing, the enhancement of social security was initially regarded as a key policy task. However, social security finance, including pension system finance, has been squeezed in all of those countries, and policy measures intended to create more jobs for young people and reduce the unemployment