SHORT TERM SCIENTIFIC MISSION (STSM)
SCIENTIFIC REPORT

This report is submitted for approval by the STSM applicant to the STSM coordinator

Action number: IS1409
STSM title: Extended working life – how do gender, health and (life) satisfaction relate to longer activity? What else matters?
STSM start and end date: 18/02/2019 to 01/03/2019
Grantee name: Dr. Michaela GSTREIN

PURPOSE OF THE STSM:

My STSM with Dr. Laura Romeu-Gordo at the DZA (Deutsches Zentrum für Alterfragen) had the following main purposes and planned contributions to the COST Action:

•	I hoped to learn at DZA in Berlin how they generally approach research related to extended working life, also in the German context, and which methods and ideas (about trends, developments and relevant indicators) they have and apply. This is useful for and add to our discussion of drivers and barriers of extended working life so far undertaken in WG3.
•	I wanted be able to access SHARE with some guidance from Laura, who knows the data set well. I have been working with other data sets, but never with SHARE before, so this will be of great help.
•	I wanted to see, experience and discuss which other data sets (e.g. DEAS – the German Ageing Survey) and approaches Laura generally uses. Since we have both been researching labour market issues, extended working life, inequalities and topics around ageing, this can be a fruitful exchange, not only on data but also on methods to apply (and what to be careful about).
•	I planed to show her the data and approaches I generally use, especially also the EQLS – which I think holds interesting possibilities to get indicators for comparison at EU level.
•	As final outcome of the STMS, I hope to have (further) upgraded my SPSS/STATA skills, knowledge of relevant data and possible indicators.

In addition, together with Dr. Laura Romeu-Gordo and Prof. Tindara Addabbo, we were planning to further contribute to the COST action in general, in that
•	three COST members of different countries (AT, IT, DE) would be working on a combined research effort related to WG3 core topics
•	this would allow further discussion of indicators to watch (drivers, barriers) in terms of extended working life, with a focus on issues critically relevant for and related to women working longer.
•	I/we intended to prepare a working paper for a COST publication, to be submitted to a journal ASAP (hopefully still within the COST action duration).

DESCRIPTION OF WORK CARRIED OUT DURING THE STSMS

During the two weeks I spent with Laura at DWA in Berlin, we discussed and worked on a research project related to extended working life, with a special focus on how to measure impact factors of prolonged working careers or retirement decisions. The intention was to work on and produce a first draft COST paper on and with the participation of researchers from three countries, i.e. with Dr. Laura Romeo-Gordo

from Germany, Prof. Tindara Addabbo from Italy and me (Dr. Michaela Gstrein) from Austria. We had discussed the project before during our COST Action and now wanted to look more specifically at some data.

While in Berlin, Laura and I started out with the idea to use SHARELIFE (wave 3, retrospective life histories) for the comparison but – after some data analysis - found we had too few observations when looking at women who retired between waves 2 and wave 3 (SHARELIFE). So we had to change our approach and after some testing decided to look at a combination of SHARE waves 4, 5 and 6 instead, which would also have the advantage of more recent data (2011, 2013, 2015), but the disadvantage of not getting to include life histories since unfortunately only the next wave (wave 7, available later this year) will include such data again.

The main research idea was to focus on work-retirement decisions in three countries (AT, IT, DE). The data used was SHARE waves 4/5/6 – allowing us to look at and investigate work-retirement transitions during the years 2011-2015, i.e. either from wave 4 to wave 5, or wave 5 to wave 6, or (for cases of missing wave 5 data) from wave 4 to wave 6. We focussed on employed women (men) for which the data showed a transition from (a) employment to retirement or (b) no such transition from employment to retirement (so that they either remained employed or became unemployed or homemakers). The age group we were looking at was those from 50-80 years. We had initially considered looking at a smaller group (50-70) but it turned out that some people in our sample retired only after 70 (maybe the self-employed) but added to our (not too large) sample size. This would also allow us for older retirees – not a bad idea given that this is where policy tends to lead.

The work went well to plan and the researches at DZA were very welcoming. I was able to discuss with Laura (and also some of her colleagues) her and the DZA approaches to longer life and extended working careers, the data they usually work with, look into, discuss and investigate German data, work on the SHARE data set, improve my SPSS skills and watch Laura working with and explain some analysis in STATA, as well as analyse some SHARE data related to our research question. We took time to profoundly investigate our research ideas, further specified the focus and target of our analysis and used various sub-data sets and variables to investigate and discover related issues and impact factors.

[In addition, we also spent some time together on the **discussion and preparation** of the required COST material for the upcoming final policy event in Brussels (next week, March 6th) and on the discussion of our Springer chapter as well as related data and policy issues, which was very useful – I guess for both of us, but of course especially for me.]

DESCRIPTION OF THE MAIN RESULTS OBTAINED

My STSM at DZA in Berlin was really a good opportunity and experience with lots of discussion and exchange on how and with which datasets and methods to best approach the extended work life analysis, and which factors to take into account. Of course data restriction is always an issue, but (after some not successful tries) we managed to find a relevant dataset (a sub-set of SHARE waves 4,5 and 6) for our purpose. I thought that the process of investigating which data to use was also very enlightening, as was the initial analysis of other SHARE data – which showed us (again) that without relevant indicators/variables in the survey not even the best of research ideas can be realized! I guess we need to intervene already at the time of data collection to better shape questions and bring out matters important for especially longitudinal (lifecourse) research.

What do we see from our combined SHARE data set? The combined SHARE wave 4+5+6 offered us a larger relevant subsample than the SHARELIFE data. Within the three combined SHARE waves, the number of relevant cases (with data in at least two waves) and thus the possibility to investigate a transition (from employment to retirement in the years 2011-2013-2015) was 4452, with 2286 women and 2166 men. Despite this initially favourable sample size, only 317 women and 341 men were actually making a transition from employment to retirement. Within the transit-group, the country and gender split was more or less even, with overall somewhat fewer cases for Italy.

We proceed with a more in-depth investigation of the data which showed that the number of cases (for both men and women) gets quite small when we look at the relevant sub-criteria we are interested in for our analysis of impact factors. Descriptive analysis, however, was less of a problem – which we did in various ways, mostly several-layer cross-tabs and charts (showing the distribution but also the outliers).

While there obviously exists some difference between the three countries as well as women and men,

significance of findings has to be looked at and might be a problem due to small sample size. We also found that the data set contained many missing items (obviously some questions, e.g. matitial status, number of children, etc. had only be asked in one/some waves) – and started to work on filling them by sensible imputation, with data from earlier waves.

In the last two STSM days, we continued to work on the dataset and did some (early/repeated) analysis of our (now mostly readjusted) SHARE sub-dataset, with step-wise more variables/indicators added. To account for the low number of transit cases ,we decided to run a probit model for the combined three countries. The intention was to explain observed retirement decisions by personal, work place and framework conditions. We started out using the most relevant possible drivers and barriers available in our data set (such as age, gender, family status, education, work stress, number of children, household size, health, etc). We want to extend and better specify the model in the future. For our intitial probit model, we found that many of our variables did not have significant effects, although the literature and previous studies would indicate impact. Only gender - and sometimes age - were the exception. We think the reason might be the small data set which did not allow us to go further in detail – a problem we want to solve in future research.

FUTURE COLLABORATIONS (if applicable)

Yes, future collaboration is planned and will not be limited to the time frame of the COST Action.

We (Dr. Laura Romeu-Gordo, Prof. Tinadara Addabbo and I) will continue to work on the planned three country (AT, DE, IT) paper on extended working life with a focus on drivers and barriers of retirement decisions (see section purpose) and we will further collaborate on related research.

I might also visit Professor Addabbo in Modena later this year, for further collaboration on lifecourse analysis related to longer/extended working life and other gender-relevant issues. With Laura interested in such research too, further combined research efforts are to be expected. Maybe we can also use the upcoming new SHARE data (wave 7 with some more lifecourse data) for this, especially since it allows for good cross-country comparison. Otherwise, some local (country?) data sets might be useful too – such as Soep in Germany. I have to check if comparable longitudinal data sets (with relevant variables) exist in Austria and Italy as well.