

# Theorising Later-Career as a Basis for Enhancing Inclusion and Extending Working Lives Through Human Resource Development

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## Abstract

Population ageing in developed economies has prompted national level policies for extending working lives (EWL). However, these policies have typically failed to reduce age discrimination or premature workforce exit. Therefore, organisational policies for EWL are currently to the fore and human resource development (HRD) ‘activation’ policies are evaluated here. However, these policies are found to be of only limited effectiveness in ensuring social justice, equity, and inclusion in later-career and beyond. A Critical-HRD lens is adopted to show how the established HRD narrative of lifelong learning can inadvertently contribute to workers being disadvantaged in later-career. Social-constructionist identity theorising is developed to better understand later-career and to explain older-workers’ behaviour. The theorisation is then applied to discuss HRD interventions with potential for developing a positive sense-of-self among older-workers and retirees to thereby improve equity, inclusion, and social justice. Implications for HRD researchers and professionals and for HRD policy for EWLs are detailed.

## Keywords

older-workers, extending-working-lives, later-career, social-justice, inclusivity, identity

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## Research Context

Across the developed world, populations are ageing. The United Kingdom exemplifies this phenomenon. Whereas in 2015 just over twelve percent of the UK population were aged over sixty, by 2050 nearly twenty percent will be in this age-group ([Office for National Statistics, 2023](#)). Over the same period healthy life-expectancy is predicted to rise by up to five years ([Raleigh, 2022](#)). Therefore, it is suggested that the workforce will need to 'grey', with employment and self-employment increasing among the over 60s ([Lain et al., 2022](#)). However, a trend established during the 1990s towards retirement around age 60, that is, well before the statutory pension age in most nations, remains common ([Browne et al., 2019](#)).

Retirement decision-making, and the broader issue of economic inactivity among the older-workers arising from premature workforce exit, have been extensively researched (e.g., [Lain et al., 2022](#); [Phillipson, 2022](#)). Early retirement and premature workforce exit are to some extent distinct phenomenon. Early retirement is typically prompted by pull factors such as an occupational or life-stage 'window', 'cashing out' on a financial incentive or having a life epiphany ([Vough et al., 2015](#)). Such planned early retirement is particularly evident among those who have defined benefit pension schemes with a reasonable earnings replacement ratio. For such workers early retirement, perhaps as early as 55, is noted ([Taneva et al., 2016](#)). By contrast, premature workforce exit is prompted by push factors including becoming disillusioned and feeling discarded ([Vough et al., 2015](#)). A significant push factor is work pressure and a resulting dissatisfaction with either occupations or organisations ([Keogh & Roan, 2016](#)). These phenomena create alienation and 'worn out syndrome' ([Aabo et al., 2023](#)). Where workforce exit is unplanned and possibly forced, becoming unemployed often means staying unemployed ([Burmeister et al., 2021](#)).

The level of voluntary or involuntary economic inactivity among the over 55s in the UK has increased by three times since 2008 ([Carrillo-Tudela et al., 2022](#)) and there is evidence that such increasing inactivity is widespread across developed economies ([Vignoli et al., 2021](#)). Continued early and premature retirement, and a reluctance of employers to recruit older-workers who are looking for work, poses social, economic and political challenges. Socially, there is evidence that even when controlling for variations between individuals' health, both wellbeing and life-expectancy are reduced by premature retirement ([Mazumdar et al., 2018](#)). Similarly, more positive retirement experiences are reported among those who retire later compared to those who retire earlier ([Bentley et al., 2019](#)). Economically, labour shortages attributable to early workforce exit are noted across many sectors ([Schippers, 2023](#)). Moreover, worsening dependency ratios, that is the ratio of earners to recipients of pensions and other social benefits, worries economists ([Thomas et al., 2014](#)). Political concerns focus on the generational divisions and weakening social cohesion arising from a high proportion of non-economically active later-career workers who are nonetheless property-owners and pension recipients ([Egdell et al., 2020](#)).

The complexities of defining older-age have been analysed (e.g., [Kooij et al., 2008](#)). Generally, those aged between 55 and 70 are regarded as older-workers or as workers in later-career ([Phillipson, 2019](#)). However, there is consensus that ageing is subjectively and societally specific. For instance, Butler's seminal work demonstrates how identifications, including age, are structurally determined by socio-cultural forces ([Riach, 2007](#)). An individual's sense of being older is thus influenced by a nation's state pension age, by occupational and professional norms, by health and lifestyle, by family circumstances, and by educational level ([Carlstedt et al., 2018](#); [McCarthy et al., 2014](#)). For example, while workers in pressured occupations such as front-line medicine likely feel older at a lesser chronological age than workers in occupations that have traditionally provided more personal control such as academia ([Cahill et al., 2019](#)). National institutional differences also shape perceptions of age. Varieties of capitalism theorising ([Hall & Soskice, 2001](#)) positions nations based on their socio-political and economic institutions along a dimension from liberal-market-capitalism to social-market-capitalism. Such positioning influences whether retirement occurs early or prematurely or whether working lives are extended ([Schmidhuber et al., 2021](#); [Schröder et al., 2014](#)). In social market capitalist systems retirement might be early and voluntary but at the same time continued working is supported by accommodative national level policies. By contrast, in liberal market systems workers are more likely to be 'pushed' into premature exit, by, for example, a performance culture that provides no slack for tiring, older workers ([Hofäcker et al., 2016](#)). While national institutional differences persist ([Brewster et al., 2023](#)), the liberal market variety of capitalism is ascendent and convergence is noted across OECD countries to implement national policies to extend working lives [EWL] ([Hofäcker et al., 2016](#); [Mok et al., 2021](#)).

EWL policies include removing employment blockages such as legislating against age discrimination and creating opportunities such as funding apprenticeships for seniors ([Nanji & Harris, 2023](#)). However, policies have mainly focussed on limiting early-retirement. Policies in this area include the abolition of statutory retirement ages, the deferral of eligibility for state pensions, the weakening of state pensions' income-replacement ratios, and restricting the tax advantages for private pensions savings ([Carlstedt et al., 2018](#)). While the evidence for the impact of both national and organisational EWL policies is mixed as will be discussed, national policies have reportedly, in the UK case for example, served to extend working lives by an average of 24 months ([Lain et al., 2022](#)).

## Research Aim, Objectives, and Method

While general management research has examined later-career and EWL policies for a decade or more, much of this work is descriptive or prescriptive with little theoretically informed critical evaluation. Similarly, in the HRD space, an absence of systematic theoretical understanding is noted ([Bierema et al., 2023](#)). Therefore, the overall aim of this paper is to build understanding, through adopting a Critical-HRD perspective and

coherently theorising later-career and retirement, to thereby evaluate established attempts to EWL and to inform new HRD approaches to EWL in socially just ways.

The objectives to be addressed are as follows. First, to overview existing organisational policies for EWL and the established HRD contribution. Second, to highlight continued age-discrimination at work and the associated limitations of EWL policies in preventing older-workers' early or premature exit from paid-work. Third, to examine the emerging Critical-HRD approach as a platform for understanding the limitations of existing EWL policies. Fourth, to leverage the Critical-HRD perspective by supplementing the traditional theoretical foundations of HRD through developing theorising aligned with this perspective, namely identity theorising, to better understand later-careers. Finally, to apply this identity theorising in evaluating how established HRD EWL policies can unintentionally reinforce disadvantage and to then consider more inclusive, emancipatory and socially just approaches to later-career.

Addressing these objectives involved extensive engagement with diverse literatures and this paper takes the form of a review. Eight types of HRD review papers were discerned by Garavan (2023) and addressing the objectives here has required combining facets of a narrative review and a critical essay. Garavan (2023) noted how narrative reviews are useful in theory building particularly where an area of investigation crosses disciplines, whereas critical essays draw attention to a contradiction or controversy in HRD. While methodological pragmatism and flexibility characterises these two review types, transparency regarding the reviewing approach is required (van Beveren et al., 2018). A traditional systematic review paper requires exhaustive searches against clear, predetermined criteria. By contrast, for reviews of the type presented here a targeted, purposeful search was undertaken (Kumar et al., 2021). Two waves of searching and reviewing occurred. In the first wave, the targeted literatures included those of HRM, HRD, career management, gerontology, and general management, with sources published between the mid 1990s, when age at work began to be systematically studied (Phillipson, 2019), and 2023 being targeted. The search themes included combinations of age and work, retirement, later-career, older-workers, extending-working-lives, and bridge-employment/work. In these areas the prominent journals were, *Human Resource Development Review*, *Human Resource Development International*, *Human Resource Management Journal*, *International Journal of Human Resource Management*, *Journal of Management Studies*, *Ageing and Society*, *Work*, *Ageing and Retirement*. The second wave of reviewing was informed by research establishing the relevance of identity theorising to understanding HRD (e.g., Black et al., 2018) and the organisational behaviour and work psychology literatures were targeted using concepts associated with identity in relation to age and work. Here, the prominent journals included *Human Relations*, *Management Learning*, *Organization*, and *Organization Studies*. The contributions to a definitive edited handbook on identities in organisations (Brown, 2020), proved invaluable. The authors worked independently to find sources from these literatures and to assess their relevance, with frequent comparative checks occurring. Initial searches were followed by snowballing

from the most relevant sources: that is, using the reference lists and subsequent citations of these sources to find further useful sources (van Beveren et al., 2018).

As a narrative review and critical essay, the analysis of the sources was more interpretative than in a systematic review. Themes were discerned and then organised. First, based upon the authors' prior familiarity with the two fields, loosely pre-determined, deductive, themes were applied in constructing notes from the sources. Second, following the principles of abductive analysis, themes emerging from the sources were brought into play in reviewing new sources and in re-reviewing previously analysed sources (Anderson, 2017; Hamlin & Stewart, 2011). Third, the themed source notes were synthesised and organised into the coherent account presented here. The credibility of this account was assured through the two authors independently discerning the themes and engaging in constant comparison and critical reflection on discrepancies in the themes identified (Lundgren et al., 2019).

The paper is now structured following the objectives outlined earlier and begins with an overview and evaluation of policies for EWLs. The paper then examines the Critical-HRD perspective before leveraging this perspective in developing identity theorising as an alternative understanding of later-careers and EWLs. The theorising is then applied in appraising the limitations of established policies to EWLs and to explore alternative options for EWL better aligned with the needs of older-workers and more likely to ensure social justice.

## **Extending Working Lives: Evaluating the Established HRD Contribution**

As seen, national level policies in certain liberal-market economies may have delayed older-workers exit from employment. However, such policies have unsurprisingly done little to engender positive engagement or enhance productivity among later-career workers (Phillipson, 2022; Vignoli et al., 2021) and the main driver for continued working is often quite simply older-workers' financial necessity (Browne et al., 2019; Roberts, 2006). Therefore, organisations themselves have widely introduced policies to extend working-lives. Reviewers of such policies typically distinguish between accommodating HRM policies, such as flexible working, and a range of activating HRD policies (e.g., Visser et al., 2021).

Activating HRD policies attempt to enhance the capabilities of older-workers and such policies are found to be more effective than accommodating policies in EWL (e.g., Dello Russo et al., 2020; Rocco et al., 2003). While it is often assumed that older-workers are inflexible and unwilling or unable to learn, and while older-workers might not put themselves forward for formal development opportunities, studies repeatedly show that older-workers are curious and motivated to learn (Reio & Davis, 2005; Warhurst & Black, 2015). Mok et al. (2021) thus found that across all the studies reviewed, access to career development opportunities served to improve the retention and renew the engagement of older-workers. Research findings indicate that two areas of development are particularly embraced. First, contrary to assumptions, older-workers are receptive to development to

enhance their capabilities with digital media (Comunello et al., 2023; Taneva et al., 2016). Torres et al. (2019) account for this receptivity in terms of selection, optimisation, and compensation theory. Older-workers 'select' and 'optimise' digital innovations in particular as these 'compensate' for age-related declines in fluid intelligence (memory and speed of thought). Second, and by contrast to declining fluid intelligence, crystalline intelligence (practical wisdom and emotional intelligence), generally increase with age (see, Kim & Kang, 2017) and development that builds upon such capabilities is also particularly welcomed (Warhurst & Black, 2017). For instance, older-workers often leverage their distinctive capabilities in mentoring younger workers but report valuable incidental learning for themselves from providing mentoring (Kim & Feldman, 2000). Older-workers are found to favour development such as this when it occurs in the flow of work rather than through formal interventions (van Woerkom et al., 2023; Warhurst & Black, 2015). In sum, older-workers typically wish to continue learning provided that this learning is on their own terms, at their own pace, and is not forced (Carlstedt et al., 2018; Rego et al., 2017).

However, in practice HRD activation policies are found to be typically inadequate and older-workers report receiving few opportunities for formal development and often languish in jobs that do not afford opportunities for informal learning (Lazazzara et al., 2013; Warhurst & Black, 2015). Moreover, the targeting of such policies on older-workers can, in a context of age-averse organisational cultures with limited respect for older workers, result in workers who are seen as needing special treatment being marginalised (Rocco et al., 2022). Therefore, those older-workers who remain in employment reportedly often feel ill-at-ease in their workplaces and in the UK for example, age discrimination legal cases now outnumber those for race or gender discrimination (Carlstedt et al., 2018; Lain et al., 2022). Ageism is thus a still acceptable 'ism' and is often unchallenged within organisations (Gratton & Scott, 2020; Schippers, 2023). Further, intersectionality research (e.g., Bierema et al., 2023; Radl, 2012) shows how when age coincides with characteristics such as being a racial minority or of a lower socio-economic class, so disadvantage is compounded, and involuntary workforce exit is precipitated (Cidlinska et al., 2022). In sum, as observed earlier, many older-workers are pushed into leaving paid work prematurely.

## From HRD to Critical-HRD

There is, therefore, scope for HRD at the organisational level to do more to reduce discrimination and disadvantage, and to improve social justice for older-workers. The discipline of psychology, particularly educational and occupational psychology, underpins much HRD research and practice. This disciplinary grounding has provided invaluable theoretical bases for HRD in areas such as learning style preferences, career anchors and identity self-categorisation (e.g., Randel et al., 2018). However, the psychological tradition tends to downplay socio-structural factors, such as pervasive negative assumptions about ageing. Theorising such factors can enhance understanding of the disadvantages experienced by older-workers. The neglect of structural factors in psychological theorising is compounded in practice as HRD has from its inception been

conflicted and this further accounts for the limited progress in improving the position of older-workers. On the one hand, one key goal of HRD has been to enable employee learning to achieve human potential. However, on the other hand, and possibly in conflict with the former goal, the second key goal of HRD has been to achieve managerial and organisational strategic objectives (Bierema et al., 2023). Until recently, this second goal was in the ascendancy with HRD being characterised by a performance paradigm (Collins & Callahan, 2022). By foregrounding social-structural factors at a theoretical level and by bringing the first practice goal to the fore, the evolving Critical-HRD perspective provides a basis for a more thorough examination of the problems of older-workers' early exit, workforce exclusion, and discrimination in work.

Critical-HRD thus represents a third-wave of the evolution of HRD (Han et al., 2017) and emerged from the sociological and adult-educational perspectives on human development (Black et al., 2018). These disciplinary perspectives show how the psychological and economic foundations of mainstream HRD while invaluable, nonetheless result in HRD having an inherent tendency to align with performative managerial discourses and therefore inadvertently sustain inequity for other stakeholders.

Critical-HRD strives to expose the power asymmetries that subjugate certain stakeholders such as the majority of older-workers who have limited hierarchical status (Callaghan, 2022; McKenzie et al., 2014). In particular, Critical-HRD highlights the limitations of the prevailing organisational HR goals of achieving equality and diversity and asserts the need to go further through fostering equity and inclusiveness. That is, Critical-HRD moves HRD from an economic grounding to a moral grounding. Whereas equality provisions focus on ensuring equal access to resources such as development opportunities, differences are downplayed. By contrast, equity is fundamentally about social justice whereby everyone is resourced fairly, according to their needs (Bierema et al., 2023). Similarly, whereas diversity is simply concerned with the representation of previously under-represented groups in organisations, inclusion respects difference and ensures all are valued, feel belonging and can thrive (Collins & Callahan, 2022). Through development interventions informed by Critical-HRD, formerly marginalised groups such as older-workers, are, as will be seen, empowered and emancipated to achieve their full potential regardless of whether this development aligns with immediate organisational needs (Rocco et al., 2022).

While Critical-HRD provides a basis for understanding the continued problem of age discrimination at work and the limitations of existing EWL policies, those using the approach have thus far prioritised understanding and action to reduce gender and race inequality. Critical-HRD scholars have yet to focus on age discrimination with such discrimination being referenced merely in passing in Bierema et al.'s (2023) recent landmark Critical-HRD text. This can, perhaps be explained in terms of the absence of a suitable theoretical toolkit compared to say, the study of gender inequalities where theorising such as that in the intersectionalities space is at an advanced stage and providing insights of value to HRD policy and practice. Therefore, to realise the



potential of Critical-HRD in improving the situation of older-workers requires stronger theoretical understanding.

## **An Identity Understanding of Later-Career**

Traditionally later-career and EWL have been theorised psychologically and various such theories cluster under a life-span umbrella. In general, life-span theorising postulates that individuals change psychologically over time and prioritise different goals at different life stages (Burmeister et al., 2021). A range of such lifespan theories are discerned. While these theories effectively reviewed elsewhere (e.g., Greller & Simpson, 1999), a brief overview here points to the limitations of such theorising for advancing the Critical-HRD agenda of equity and inclusion. First, continuity theory and second, the related conservation of resources theory, explain how individuals attempt to maintain facets of their life trajectories. For example, attempts are made to continue using key skills through into later-career, into bridge-jobs and in life beyond paid work (Pak et al., 2021; Sturges & Bailey, 2023). Third, socio-emotional selectivity theory predicts that with growing awareness of the finitude of life, so individuals may change the focus of their motivation (Mazumdar et al., 2021). Fourth, optimal distinctiveness theory postulates that individuals strive to achieve self-esteem through expressing their uniqueness in later-life (Parker & Andrei, 2020). Whereas these theories downplay the structural forces influencing ageing, a further widely used psychological theory of aging, life-course theory, brings such features into play. Life course theory, analyses lives within their socio-historical and cultural contexts, examining how future decisions are shaped both by personal positioning and history (Giele & Elder, 1998).

However, the Critical-HRD perspective suggest that more systematic theorisation of the interplay of structure and agency is required in understanding the disadvantaging effects of age at work, the limits to existing EWL policies, and as a basis for a more fruitful approach to EWLs. Identity theorising has potential here accounting for a range of organisational phenomenon where agency and structure interplay. While some suggest that identity theorising has “lost its bite” (Alvesson & Gjerde, 2020, p. 17), the contribution of identity theorising to understanding HRD is increasingly recognised. For instance, it is found that HRD interventions are more effective when supportive of individuals’ desired identities (e.g., Warhurst, 2016; Rocco et al., 2022).

Identity is, though, a nuanced field with an array of parallel conceptualisations (Corlett & McInnes, 2020). Certain conceptualisations are grounded within a functionalist paradigm and assume that identity is largely stable, being both innate and ascribed, and thereby akin to the concept of having a particular character. By contrast to such individualised accounts, a social-constructionist conceptualisation has emerged from the interpretivist paradigm and influenced by sociological perspectives. This social-constructionist conceptualisation is in the ascendent in management studies. Within this conceptualisation, identity is understood as processual, being claimed, contested, defended, achieved, and sustained over time (Ashforth et al., 2020; Mizzi &



Rocco, 2013). Identity is always unfolding and provisional, an ongoing accomplishment and momentary achievement (Brown, 2022). Identity is thus for much of life a process of becoming rather than a state of being, a reflexive project of the self whereby individuals attempt to construct and perform who they want to be (Watson, 2020).

Identities are enacted and embodied but are mostly a linguistic accomplishment and are narrated into being. Narrations draw upon the discursive resources available to individuals in their social contexts. For example, occupations provide the building-blocks for constructing certain ways of being with prevailing discourses shaping narrations of the self in relation to age. As the name, social-constructionism suggests, identity is seen as a social process. Brown (2015) thus noted, “the self is fuelled by the identities it feeds on” (p. 23). Even when alone, the sense-of-self depends on others as the voice of the community joins inner conversations about who the individual is and wants to be (Ybema, 2020). Identities are thus co-constructions with others. The socially situated nature of identity results in individuals typically comprising multiple, coexisting identities with subtly different selves being enabled or invoked and enacted in different social contexts (Beech & Broad, 2020). These multiple identities may be coherent but may also be in tension (Corlett & Mavin, 2014).

Layers of social influence are discerned such as family roles but notably for HRD, occupational roles. In Western and East-Asian societies many individuals, even those in routine jobs, find their own identity and are identified by others by the work they do (Hofaecker et al., 2016). Work roles typically enable the construction or maintenance of a desired identity (London & Sherman, 2021). Identifying with occupational roles extends working lives and delays individuals identifying themselves as old which promotes wellbeing (Hutchings et al., 2022). However, conversely, being socially identified as older in a workplace can prompt early exit from the workforce (Radl, 2012). Nonetheless, socially ascribed identities can be tamed to some extent through individual agency in the form of identity-work. Identity-work involves a process of individuals’ sense-making to construct, maintain and, as necessary, repair, a desired, coherent, and authentic sense-of-self (Brown, 2022). Diverse types of identity-work are discerned (e.g., Sheep, 2020). Types can be interlinked and occur in parallel with the ‘repairing’ and ‘aspirational’ identity-work types being commonly noted (Brown, 2020). Variants of these types of identity work are significant in later-career and retirement as will be discussed later.

Mizzi and Rocco (2013) asserted the benefits of an integrative understanding of identity theories in HRD and social-constructionist theorising can be complemented by theorising from the social identity theory (SIT) tradition. SIT postulates that social categories and their associated collective identities are internalised by individuals in their own identities, whereby the essence of the collective is reflected in the self (Ashforth et al., 2020; Tajfel & Turner, 2004). Individuals have a high propensity to define themselves through binary opposites, that is through affiliation with a favoured group or groups and through disidentification with unfavoured groups, to thereby build optimal distinctiveness and uniqueness (Sheep, 2020). Individuals are not, though, at liberty to simply self-categorise and define themselves in relation to a favoured

group. Individuals must be accepted by and socialised into the favoured group, becoming defined as ‘one of us’ and not ‘one of them’ (Rocco et al., 2022). For instance, older-workers are, as noted, typically assumed to be slow to learn and reluctant to use digital technologies. However, an older-worker who is accepted by and feels ‘one of us’ among a youthful workgroup who are equally avid users of digital media as older-workers themselves typically actually are (Comunello et al., 2023), is likely both to identify as and be identified as occupationally proficient. Therefore, such a worker is likely to continue in employment.

## Identity, HRD and Vulnerability in Later-Career

While older-workers may therefore have some agency to position themselves among youthful groups and to undertake personal identity-work to construct a positive sense-of-self, later-career brings vulnerability from powerful structural forces regulating identities less favourably (Wilińska et al., 2021). First, just as identities are socially constructed so too identities are socially constrained (Brown, 2022). A personally favoured identity can be contested and therefore requires constant re-negotiation and attempts at affirmation (Coupland & Spedale, 2020). Identities can be thrust upon and imposed on individuals. Identities can thereby be disciplined within regimes of domination resulting in exploitation and subordination (Corlett & McInnes, 2020; Watson, 2020). As noted, membership of generational groups can be a basis for constructing a desired identity. However, such group membership can ascribe a less favourable identity. Assumptions that older-workers belong to groups lacking proficiency with new developments or to groups needing special, accommodative HR policies, prompts negative stereotyping and prejudice, restricting the scope for workers identified in this way to ‘be’ anything other than deficient (Zacher et al., 2019).

Second, identities are regulated occupationally. As noted, in many cultures occupational roles are a key resource for the creation of a positive sense-of-self. However, in the contemporary neo-liberal context of work intensification (Amabile, 2019), keeping up with demands and therefore sustaining a positive identity requires ever increasing effort at a time of life when energy levels generally decline (Manor & Holland, 2022). Vulnerability arises in later-career in certain occupations where safety concerns mandate retirement at what is societally regarded as a still ‘productive’ age and in occupations where workers feel physically or mentally unable to continue beyond such an age. In these latter cases, vulnerability is compounded by the removal of mandatory retirement ages. While, reaching the qualifying age for a state pension provides some sense that retirement is acceptable (Radl, 2012), that individuals must choose for themselves to when to actually retire means that choosing to leave can be construed as choosing failure (Lain et al., 2022). Moreover, given the stigma associated economic inactivity in liberal-market capitalist societies, so paid employment serves to lock-in older-workers even when retirement might provide a more satisfying sense-of-self and thereby enhance wellbeing (Hutchings et al., 2022).

Third, identities are increasingly self-regulated, and this internal management of subjectivity is recognised as a powerful means of organisational and societal control (Coupland & Spedale, 2020). Bardon et al. (2023) apply Foucault's concept of 'governmentality' to show how such control operates perniciously. Governmentality involves discourses that serve the interests of those with power becoming hegemonic, normative, and unquestioned as universal truths. For example, in neoliberal societies discourses such as 'competitiveness' and 'winning' are pervasive and valorised. These discourses unconsciously infect and ultimately colonise individuals' identity narratives (Brown, 2022). As the discourses are typically associated with youth, so the range of positive identities available to older-workers are limited (Riach et al., 2014). Older-workers are beckoned to judge themselves against these youthful ideals, engaging in self-surveillance, self-discipline and, ultimately, self-discrimination thereby increasing vulnerability in later-career.

Mainstream HRD could, inadvertently, compound older-workers' vulnerability in this third way, by fuelling governmentality and potentially destabilising the valued identities that older workers have constructed and maintained over decades. HRD has traditionally promoted lifelong learning, and as discussed, this has become a key activation approach for extending working lives. A narrative of lifelong learning is now pervasive in Western neo-liberal societies, exemplified by the prescriptions of popular texts for 'active-ageing' and 'living later-life in crescendo' (Covey & Haller, 2022; Gratton & Scott, 2020). The 'right sort' of older person who actively-ages is defined using similar performative discourse to those now pervading society in general. The active ager is 'enterprising', 'fit and healthy' and 'busy' (Coupland & Spedale, 2020). *Prima facie* identifying in these ways could offset the sense of loss and lack traditionally associated with ageing and postpone age-related decline (Simpson et al., 2012). However, these identifiers become governmental through inculcating a sense of duty among older-workers to identify as relentless self-improvers (Patrick, 2012). An unwillingness or inability to keep-up and to sustain such a productive, ageless, identity can signal feelings of failure and guilt (Ainsworth & Hardy, 2009).

The performativity imperative associated with HRD now extends into retirement with potentially similar negative consequences for an older-person's sense-of-self. The traditional understanding of retirement from an identity perspective is in any case of identity loss: when retirement is finally accepted, particularly in cultures and occupations where people tend to be defined by their work, the experience can be existentially damaging (Hofaecker et al., 2016; Mazumdar et al., 2021). The retiree can feel displaced, losing a valued identity while gaining a less desirable identity as a retiree who is superfluous to society's main purpose of economic production (Phillipson, 2022; Sims, 2018). However, this known vulnerability might be compounded through the performative narratives of lifelong learning, active ageing, and continuous improvement that are typically advocated by HRD for wellbeing in retirement (e.g., Gratton & Scott, 2020). The idealised identity for the retiree is, therefore, that of a learner (Sims, 2018) and leisure becomes a new arena for constant busyness and self-improvement (Adams, 2021). In many cultures older-workers often aspired to a

retirement identity of being at ease after decades of physical or mental toil (Schmidhuber et al., 2021). However, in the contemporary context, a tired and worn-out older-worker who simply desires a retirement of ease is made to feel morally inferior and is potentially marginalised (Manor & Holland, 2022; Wilińska et al., 2021). It is thus argued that Western societies are in denial about ageing and fail to accept or tolerate the inevitable changes in capabilities, including objective decline in some capabilities (Aabo et al., 2023). Therefore, established HRD policies have the potential to deny social justice by individualising later-career and retirement and prompting self-flagellation for individuals who fail to constantly improve (Ainsworth, 2020; Bardon et al., 2023). Quite simply, an active-ageing narrative can be an anti-ageing narrative.

## Identity, Critical-HRD and Extending Working Lives

The performative orientation of mainstream HRD has undoubtedly enhanced the strategic status and impact of the activity (Bierema et al., 2023). However, the combination of a Critical-HRD perspective and identity theorising provides a basis for a less performative and deterministic understanding of EWL and retirement, and for more socially just, inclusive, and emancipatory HRD that respects the needs of older-workers and ensures their wellbeing. In what follows later-career is considered in terms first of restoring and second of rejuvenating the self for an extended working life and third of reinventing the self in retirement through resisting performativity.

First, the theorising points to how HRD can enable damaged identities in later-career to be restored. Identity is critical to the decision about whether to continue working or to retire (Aabo et al., 2023) and such transitional phases of life typically prompt an “intensive preoccupation with identity” (Alvesson & Gjerde, 2020, p. 2). Peaks in identity-work occur when a damaged identity needs to be restored (Alvesson & Robertson, 2016). The process of job-crafting has potential for restoring damaged identities in later-career. Although the notion of job crafting is well established (Wrzesniewski & Dutton, 2001) it is not yet widely understood or used in HRD. The literature on job-crafting provides understanding of how older-workers might, through their own efforts, re-design their work to align with their evolving needs, values, and preferences and to thereby restore a desired sense-of-self. Further, as was discussed earlier, older-workers generally favour development that provides personal control over learning. Many workers have scope to ‘avoid’ some negative aspects of their jobs while ‘approaching’ other aspects that have perhaps not yet featured prominently (Zhang & Parker, 2019). Three components to job-crafting are discerned. Task-crafting involves workers being selective about the tasks they undertake to shape their bundle of tasks and responsibilities. Relationship-crafting means that workers focus on preferred relationships at work. For instance, older-workers might focus on supporting less experienced colleagues’ learning (Warhurst & Black, 2019). Cognitive-crafting involves changing perceptions and reinterpreting the job to emphasise those aspects with most personal meaning. Any one of the three components has the potential to re-align work to support a preferred sense-of-self (Zhang & Parker, 2019). Extending job-crafting,

career-crafting (Feldman & Schultz, 2018) involves questioning the traditional notion of upward career moves being the only worthwhile career moves. Career crafting might involve horizontal career moves to find a role with more personal meaning and significance and such crafting is found to equate to delayed retirement (Mok et al., 2021). In identity terms, career-crafting, like job-crafting, has potential for the restoration a desired sense-of-self in later-and, to thereby extend a working life.

Second, identity-work in later-career can involve rejuvenation through making a new start which certain older-workers achieve through bridge-jobs (Kim & Feldman, 2000). Bridge-jobs involve older-workers leaving a long-term career post and returning to work in a different post with the same or with another organisation or beginning self-employment. Workers' bridge-jobs might be in the same or a different occupation to that of their main career. Common to all definitions is that the bridge worker's full retirement is on the horizon (Sims, 2018). Several meta-reviews analyse the extensive literature on bridge-employment (e.g., Alcover et al., 2014; Carlstedt et al., 2018) discerning diverse types and various personal benefits (e.g., Lain et al., 2022). While the main motivation for bridge-work is invariably financial (Egdell et al., 2020), bridge-jobs can give a new sense-of-purpose in later-career (Manor & Holland, 2022; Mazumdar et al., 2021). Through bridge-work the 'need to do' imperatives of early and mid-career are eclipsed by 'want to do' preferences (Simpson et al., 2012). Though bridge-work new facets of the self can be curated, or experiments undertaken with alternative identities (Miron et al., 2022). Identities can thus be rejuvenated in more desirable way (Beech & Broad, 2020). Moreover, social identity theory points to how if, as often happens, an older-worker joins and is accepted by a more youthful workgroup in their bridge-job, so a more youthful identity might emerge, potentially delaying complete retirement (Simpson et al., 2012).

Third, the theorising suggests that sustaining wellbeing and social justice when full retirement comes requires resisting performativity and undertaking identity-work to reinvent the self on one's own terms. Identities are, as noted, prone to regulation by contemporary performative discourses such as the prescription for continuous improvement even in leisure. However, individuals have agency to resist and to find distinctive and personally valued ways of being (Brown, 2022). Emerging generations are noted as identifying more lightly with employment than earlier generations, questioning the wisdom of deriving a sense-of-self from the fickle activity of paid employment (Alvesson & Robertson, 2016; Burkeman, 2021). Vough et al. (2015) thus discerned an 'epiphany' identity tactic among certain older-workers who adopted the same orientation. These older-workers resisted and relinquished occupationally based identities and sought alternative ways of being. Retirees in Western, neo-liberal societies might thus learn from cultures where identities are more holistically defined through, for example, family and societal roles (Amabile, 2019). There is, therefore, scope to renegotiate growing older and to reinvent the self beyond work based on the changed capabilities and preferences associated with ageing (Warhurst & Black, 2017). Retirees might be encouraged to engage in identity-work and to experiment with possible future selves, to realise diverse ways of being older. In achieving equity

through social justice and inclusion, HRD might thus enable individuals resist being shaped by the “joyless urgency” and frenetic doing of contemporary life, to discover the “higher calling of ease” (Adams, 2021, p. 2) and to reinvent themselves untethered from the performative clutches of work.

## Implications for HRD Research and Policy

This narrative review paper has adopted a critical essay approach and taken a Critical-HRD perspective in developing and applying identity theorising to understand the limitations of existing EWL policies. The theorising was applied to evaluate how the established HRD approach to extending working lives could, counterintuitively, reinforce disadvantage. The critical lens and theoretical tools then enabled consideration of more respectful, emancipatory, and socially just approaches to HRD supportive of wellbeing in later-career and in retirement.

The results of this paper have implications for theory and for HRD researchers, practitioners and policy-makers. Theoretically, there are two clear implications that extend understanding of the disadvantages experienced by older-workers. First, adopting the Critical-HRD perspective enables understanding of how structural factors, such as pervasive performative expectations, constrain the agency of older-workers and thereby contribute to premature exit from the workforce. The perspective highlights how legal equality provisions and organisational diversity policies are insufficient to retain and engage older-workers. The perspective shows how organisations need to progress further, moving towards equity and social justice through pursuing inclusion, that is, accepting differences attributable to ageing. Second, social-constructionist identity theorising enables understanding of the centrality of a secure sense-of-self in later-career. Identity threats and vulnerabilities increase for older-workers and likely prompt premature exit from the workforce. While the prevailing life-long-learning narrative in HRD is well intentioned, such pressure for continuous improvement can destabilise an older-worker’s secure sense-of-self. The theory shows how a requirement to constantly ‘become’ (better) undermines a sense of ‘being’, thereby corroding an established, and likely positive, sense-of-self in later-career.

The empirical study of age in relation to work and of retirement has been dominated by quantitative designs (Egdell et al., 2020). However, the theoretical insights generated here point to the necessity for HRD researchers to deploy qualitative research designs. Qualitative research will ensure that the perspectives of traditionally silenced groups such as older-workers who are not in positions of power are foregrounded (Aabo et al., 2023). Qualitative inquiry avoids deductive foreclosure on researchers’ hypotheses, allowing research participants’ own meanings to emerge, and for theory to be explored and refined or for new theory to be developed inductively. Moreover, when identities are understood as socially constructed, a research process that ‘generates’ data, rather than merely ‘collects’ data, is required as the research phenomenon is in part engendered by the research process (Black et al., 2018). This research process does,

however, require researchers' reflexivity on their role in eliciting the object of the research.

Reflexivity is also needed by HR Developers as practitioners, and for those involved in their education. HRD practitioners are typically employed by organisations and are thereby to some extent bounded by business imperatives and managerialist performance requirements. However, in enabling older-workers to flourish in work and in life beyond work, the professionalism of HRD must usurp this latent managerialism. HRD practitioners must, therefore, challenge their own identity positions by questioning their possible and unconscious adherence to normative performance narratives. HRD practitioners need to address the question; 'am I being professional or merely managerial?' (Rocco et al., 2022). In being truly professional, the HR Developer's mission needs broadening through the adoption of a more radical and thereby impactful agenda (Collins & Callahan, 2022). Recognising 'embedded mechanisms reproducing ageism' is an important starting point for this agenda (Cutcher et al., 2022, p. 975). Callahan (2022, p. 20) thus noted that HR Developers should 'cultivate awareness ... of the injustices and suffering experienced by others' and reflect critically upon power relations and their own role in sustaining such relations. Therefore, HRD practitioners might engineer the age aligned HRD policies and practices outlined earlier while also acting as advocates for older-workers. As advocates for older-workers, HRD practitioners will need to foster individual and collective agency. Individuals and groups will thus need empowering to discern and then achieve personally preferred and sustainable ways of being in later-career and into retirement. By acting in this way and prioritising professionalism over managerialism, and a moral agenda over an economic agenda, HR development practitioners will contribute to more sustainable organisations and society. In turn, this re-prioritisation will ultimately yield the economic benefits traditionally sought. Thereby the hard-won business credentials of HRD can be maintained while at the same time the credibility of HRD among other key stakeholders, notably, workers, can be built.

The results in this paper show that age aligned HRD policies are needed both to retain and to further engage older-workers and to avoid denigrating retirees (Drabe et al., 2015). As seen, the established HRD policies of life-long learning and continuous improvement potentially and unintentionally marginalise older-workers, corrode identities and do little to improve social justice. HRD policies are therefore needed to enhance agency through supporting older-workers' restoring and rejuvenating identity-work in later career and reinventive identity-work in retirement. The earlier analysis suggests the prioritisation of policies to support job-crafting within existing work and career development to encourage career-crafting or bridge-employment either within existing organisations or elsewhere. The results also point to the need for Organisational Development interventions to challenge chrononormative assumptions about life-stages and career-orientations, to build inclusivity and to cultivate respect for older-workers through an appreciation of difference and distinctive contributions. Finally, for older-workers themselves, traditional pre-retirement training might be supplemented by interventions to enhance reflexivity in later-career. Individuals might thus be enabled



to appreciate the existence of hegemonic performative narratives, to understand the insidious identity-regulating effects of such narratives, and to resist the resulting limiting and disadvantaging identity positions. Through reflexivity, older-workers' awareness of their possibly changed values and preferences in later-life and of the need for identity transitions can be examined and new ways of being in later-career and beyond to ensure wellbeing can emerge. In sum, truly Critical-HRD informed by identity theorising can promote a new and emancipatory agenda for achieving social justice for older-workers. The agenda of extending working lives through active-ageing might, thus be replaced by a narrative of inclusivity where encouragement to continuously improve and the associated internalised strivings to 'become', are displaced by satisfaction with 'being'.

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