# British and German school teachers and their conceptualization of their work-retirement transition: Using a life course approach

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**ABSTRACT**

*Purpose*

This paper explores teachers´ conceptualizations of their work-retirement transition, and explores factors that influence such transitions in two countries: Germany and Britain. This is relevant because of a teaching force ageing and a trend towards early retirement, leading to teacher shortages and retention challenges. Employing life course theory, this paper assumes that motivations regarding such transitions are based on a teacher´s institutional, organizational and private-life context.

*Design/methodology/approach*

The paper uses a qualitative multi-level case study design, and employs 20 biographical interviews with teachers aged 50plus and 26 interviews with experts in two school districts. The data is analysed using thematic analysis.

*Findings if paper is empirical*

The study found that teachers´ conceptualizations of their late careers are influenced by individually-specific, though overall similar factors, such as stress, financial background and family. However, British and German teachers use divergent strategies to approach career choices. These mirror the respective institutional context. Despite this, British teachers were mostly able to employ human agency within an overall enabling structure to adapt career transitions to their individual needs. German teachers had less opportunities to use human agency due to a more restricting institutional structure. Human agency could, however, be used to shape transitions at the individual´s own expense by, for example, self-financing early retirement.

*Research limitations/implications*

As this study is based on a qualitative study in two school districts, findings cannot be generalized across the entire population of teachers in Britain and Germany. Furthermore, emerging themes refer to those teachers who were thinking of the work-retirement transition in the late 2000´s. Teachers making this transition earlier or later might be faced with different institutional opportunities and constraints that influence their decision making process.

*Originality/value of the paper*

The paper offers insights into individual work-retirement transition decision-making processes as well as their underlying influence factors using a life course theory approach. The contribution of the paper is that it holistically considers influence factors on the institutional, organisational as well as individual level, while previous research did not do so.

**KEYWORDS**

life course theory; career; work-retirement transition; teacher; Germany; Britain

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## INTRODUCTION

This paper discusses secondary school teachers´ conceptualizations of their work-retirement transition in light of institutional, organizational and individual influence factors in two countries: Britain and Germany. The study uses a life course perspective, and draws on semi-structured interviews with 20 German and British teachers aged 50plus as well as with 46 experts such as school principals and Human Resource Managers at the school and school district-level. Exploring work-retirement transitions of workers in general and of school teachers in particular is relevant because an increasing life expectancy and decreasing fertility rates in most industrialized countries are leading to an overall aging of the workforce. At the same time, individuals have been leaving the labor market prior to reaching national retirement age (OECD, 2006), even though recent data show a reversal of this trend (Hofäcker, 2010). Similar demographic and early exit trends have been observed in the school teaching profession (OECD, 2005). For example in Germany, 43 per cent of teachers were aged 50plus in 2000, up from 15 per cent in 1980 (OECD, 2003a), leading to a collective aging of the teaching profession (Terhart, Czerwenka, Ehrlich, Jordan, & Schmidt, 1994) and to the expected bulk retirement of 50 per cent of German teachers between 2010 and 2020 (OECD, 2003a). Similar trends are observed in the United Kingdom (UK), where the majority of teachers are aged 40 to 60 with about 45 per cent of UK teachers expected to retire between 2003 and 2019 (OECD, 2003b). At the same time, more than half of the teachers in both countries who retired in 2001 did so prior to reaching their respective national pension age (Bauer et al., 2006; OECD, 2003b). This is supported by Troman and Woods (2000) who find that due to work intensification and stress, teacher careers have become more varied with regard to career changes and (early) retirement - career changes are therefore responses to, among others, adverse working conditions.

The high (early) retirement rate among older teachers in combination with other factors has led to a skill shortage of special education teachers (McLeskey, Tyler, & Flippin, 2004), of teachers in science subjects and mathematics (Barmby, 2006) and in specific regions such as Western Germany, the South-West of England and London (OECD, 2003a, 2003b). Consequently, governments have attempted to introduce policies that guarantee the adequate supply of teachers. Policies mainly concern the improvement of the attractiveness of the teaching profession; the development of teachers´ knowledge and skills; the recruitment, selection and employment of sufficient quantities of teachers; and finally the retention of teachers (OECD, 2005). England and Wales have introduced initiatives to improve teacher recruitment numbers, including teacher training bursaries; "Golden Hello" schemes; and financial support for high-achieving university graduates (Beardwell & Clayton, 2007: 255; Menter, 2002). Incentives are therefore mainly monetary, and have shown positive effects upon the numbers of applications for and entrants into initial teacher training programs (OECD, 2005). The wastage rate[[1]](#endnote-1) in Britain, however, has remained the same, with the highest rates being observed among those aged 50plus (Smithers & Robinson, 2004). In Germany, financial incentives appear to be less important means to recruit and retain teaching staff. Instead, the German government has mainly introduced deregulatory measures to facilitate the mobility of teachers between German federal states, and measures to qualify side-entrants[[2]](#endnote-2) for the teaching profession (Terhart, 2010).

Nevertheless, it is not clear whether these measures, that mainly target young teachers and teaching force entrants, will act as incentives for teachers aged 50plus to remain in the teaching force until reaching national retirement age. This is because these measures do not address problems and challenges that teachers might experience at a later stage of their employment careers. Such challenges include ageism (OECD, 2003a; Redman & Snape, 2002), age discrimination in Human Resource Management processes (Knight, 2009), health-related problems such as stress and burn-out (Hughes, 2001; Skaalvik & Skaalvik, 2010), as well as work-family conflicts (Cinamon & Rich, 2005). Nevertheless, such challenges might influence an individual´s career decision over (early) retirement as well as the timing of such a transition. In absence of government initiatives that aim to support older teachers, it is of interest to explore how and why teachers make decisions over work-retirement transitions, and whether or not they perceive to have a choice in such decision-making processes.

Individual- or cohort-level discussions of career transitions and trajectories in later life have received attention in the Americas (Elder & Pavalko, 1993; Han & Moen, 1999; Kim & Moen, 2002; Marshall, Clarke, & Ballantyne, 2001) and in Europe (Blossfeld, Buchholz, & Hofäcker, 2006; Maltby, De Vroom, Mirabile, & Overbye, 2004; Platman, 2003). Most of this literature, however, focuses on the national institutional context or the organizational context that shapes career transitions in later life. However, there is a lack of literature that explores the interplay between institutional, organizational and individual-level factors in influencing, enabling or hindering career transitions. An exception is Moen (2004) who discusses the effects of historical, economic and policy circumstances, biographical paths, relational ties as well as organizational and occupational environments upon individual-level employment transitions and trajectories in later life. Also, some research has focused on the interaction between individual and organizational variables in explaining decisions over work-retirement transitions (for example: Hyde, Ferrie, Higgs, Mein, & Nazroo, 2004; Marmot, Banks, Blundell, Lessof, & Nazroo, 2003; Vickerstaff & Cox, 2005). Nevertheless, according to Moen (2004: 283) "*Often investigators look for static 'antecedents' of retirement timing or snapshot 'consequences', not the dynamics of the retirement process as it develops over occupational and family careers and in particular historical, organizational, and social contexts.*" Moen therefore calls for the exploration of the interrelated influence of a variety of factors upon employment career transitions in later life. In addition, Alwin and McCammon (2004) advocate that the perceived and actual relevance of decision-making factors change over time, and might, hence, affect people from different birth cohorts differently.

Similarly, living and working in different institutional contexts might influence individuals from a similar birth cohort differently, as different factors might play a relevant role in shaping work-retirement transitions. Nevertheless, most of the literature examines career transitions in later life in a single country context. Even though some literature discusses macro-level institutional differences with regard to, for example, labor market participation and pension systems across countries (see for example: Ebbinghaus, 2006; Maltby et al., 2004), there is a lack of literature that reviews the influence of a variety of macro and micro factors upon individual old age-related employment decisions across different welfare states. Therefore, the comparison of factors influencing employment decisions of older workers across divergent institutional contexts will help to better understand the macro, meso and micro mechanisms that influence, support or hinder work-retirement transitions. In order to do so, this study takes account of institutional, organizational and individual factors that influence career decisions in later life in different institutional contexts by employing a life course perspective as well as multi-level case study approach. The following sections will introduce life course theory, and will elaborate on the multi-level case study approach as well as on the interview data employed. Furthermore, the findings of the study will be discussed in light of institutional, organizational and individual-level factors that influence work-retirement transitions.

## LIFE COURSE THEORY

Life course theory is considered an important paradigm in the study of human lives (Elder, Kirkpatrick Johnson, & Crosnoe, 2004). The term life course refers to the sequence of activities and events, such as trajectories and transitions, throughout an individual´s life from birth to death. Life course trajectories and transitions do not occur in a vacuum. Instead, they are embedded in and influenced by the institutional context within which they occur. Life course theory hence considers how an individual´s life is embedded in social institutions or structures, especially with regard to social roles and positions (Mayer, 2004). Life course theory therefore focuses on the relationship between institutions and individuals across the life span, and aims to determine how national or local institutions as well as the social context influence biographies on the individual and cohort level. An important aspect of life course theory is therefore how individuals move into, through and out of social institutions throughout their lives (Macmillan & Eliason, 2004). The main organising principles of life course theory are, hence, social trajectories as well as transitions and turning points from one trajectory to the next.

Life course trajectories refer to social pathways that consist of sequences of social roles over time. While early models of individuals´ lives tended to regard only a single life course route, more recent models of the life course take account of multiple, interlocking life course roles that occur in one´s life simultaneously. Life course theory therefore allows exploring multiple, interdependent social trajectories over time (Elder et al., 2004). Furthermore, life course theory includes the concept of transitions and turning points. A transition refers to an age-graded planned or unplanned event or activity that leads to a change in an individual´s life course trajectory, i.e. the moving into or out of a social role or institutionally-defined context. Transitions signify the timing of the beginning and the end of trajectories, and allow for the calculation of their duration. This therefore helps determining whether transitions and/or trajectories correspond to or deviate from social norms and expectations in a given institutional context at a given point in time (Macmillan & Eliason, 2004). Turning points are transitions "*in which a person has undergone a major transformation in views about the self, commitments to important relationships, or involvement in significant life roles* (Wethington, Cooper, & Holmes, 1997: 217)." Such transformations might involve major life events such as parenthood and unemployment (McLeod & Almazan, 2004). Transitions and turning points therefore denote planned or unplanned changes in the way in which a life course unfolds over time. As life course trajectories are interconnected (Elder, 1985), transitions and turning points that refer to one trajectory might also influence another trajectory. Consequently, the voluntary or involuntary "choice" in favour or against a transition might lead to the alteration of an individual´s entire life course (Elder & Kirkpatrick Johnson, 2002).

Life course theory assumes the existence of four elements that influence the lives of cohorts and individuals, as well as life course trajectories and transitions, such as the work-retirement transition. First, the life course is shaped by and embedded in the historical time, place and context in which it occurs (Elder, 2003). Members of different birth cohorts and individuals in different national settings will therefore experience different life courses that reflect the opportunities and constraints provided by context and time. Furthermore, Heinz (2003) suggests that life courses depend on the degree of regulation exercised by national institutions. Second, Neugarten and Hagestad (1976) introduced the notion of "time" and "timing" into life course theory. They find that every society has values and expectations about the "right" timing for life course transitions, such as the work-retirement transition. Furthermore, the timing of life events, such as retirement, depends on available resources, and is therefore seen as a "*strategic adaptation* (Giele & Elder, 1998: 10)" to one´s environment. A third element - linked lives - is that an individual’s life course is interrelated with and shaped by the life courses of relevant peers, such as family members (Elder et al., 2004). The fourth element contains that the life course is influenced by human agency (Giele & Elder, 1998). Individuals aim to make the most rational choice available to them, however, constrained by incomplete information and by opportunities and constraints within their social context (Marshall & Mueller, 2003). Even though environmental and institutional constraints might not enable certain life course transitions or trajectories, individuals might still be able to actively manage the environment and institutions that constrict their choices by employing human agency (Furstenberg, Cook, Eccles, Elder, & Sameroff, 1999).

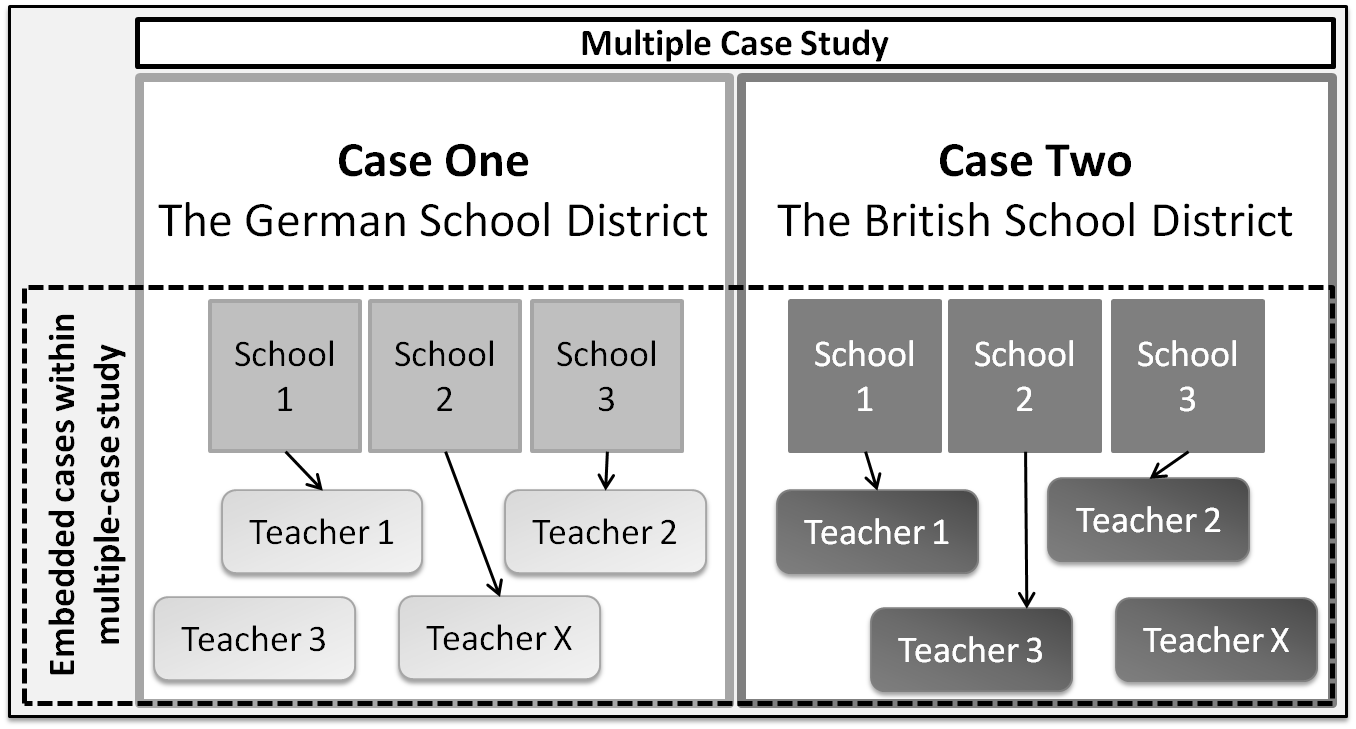
## METHOD AND DATA

In order to account for institutional, organizational and individual-level factors that might potentially influence individuals´ work-retirement transition decisions in Britain and Germany, this study will use a multiple case study design. Therefore, each national context acts as a distinct bounded case. A multiple case study design is employed if there is less interest in the particular case of one entity but in a number of contrasting cases (Stake, 2005), i.e. two national contexts. Due to their distinct approaches to education policy and teacher employment, Germany and Britain are considered contrasting cases. Furthermore, each national case is considered an embedded case study as it involves more than one unit of analysis, i.e. more than one school and more than one individual teacher. An embedded case study design is used if the relevant level of analysis is a subunit of the case, even though the context of the case is relevant in explaining the behavior of the subunit (Yin, 2009). This approach is suitable as the interest of this study is not in one particular teacher but in how teachers´ careers evolve within the cases of two specific school districts, mediated by the respective organizational or school-level environments, in which these teachers are employed.

The research design of this multiple embedded case study will be presented in Figure 1.

Figure : The multiple embedded case study design employed in this study

Source: Own illustration

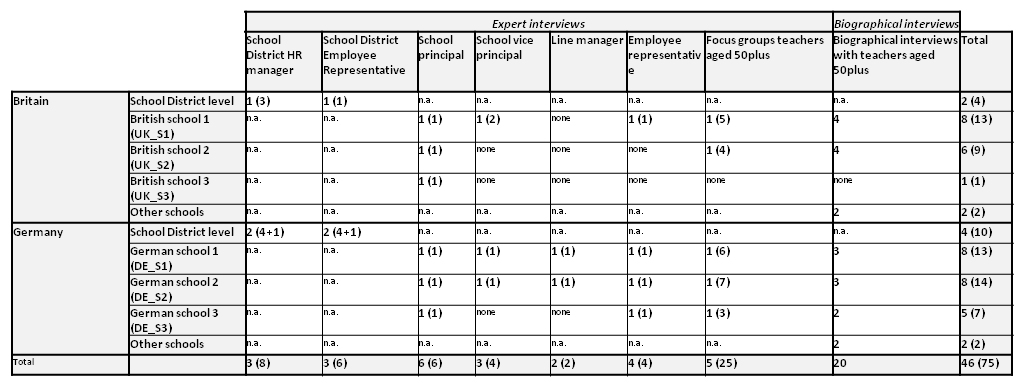


In order to explore the effects of the different subunits of analysis upon teachers´ work-retirement transition conceptualizations and decision-making processes, this study employs qualitative biographical (Faraday & Plummer, 1979) as well as expert (Flick, 2009) interview data. Both data sets were collected between 2008 and 2010 using a purposive sampling strategy in two school districts, one being situated in a large British cosmopolitan area and one representing a German Federal city-state. Both school districts were chosen as they most closely match one another with respect to socio-economic context, number of inhabitants, number of schools as well as teachers. In each school district, three comprehensive schools[[3]](#endnote-3) were identified, in which school-level interviews with experts as well as biographical interviews with teachers aged 50plus were conducted.

In total, 26 expert interviews were conducted in both countries. These were with Human Resource (HR) Managers at the school district-level as well as with school principals, vice principals and other line managers with HR responsibility at the school-level. Furthermore, trade union and employee representatives at the school district- and school-levels were interviewed in order to triangulate the interview data obtained from HR Managers and school-level interview partners. In addition, school-level focus group interviews were conducted with school teachers aged 50plus in order to assess their perception of school district and school-level HR policies and practices in general and with regard to teachers aged 50plus in particular. These expert interviews were used to contextualize the 20 biographical interviews conducted with teachers aged 50plus, 10 in each country, most of whom were employed in the six case study schools within the two school districts. All interviews were analyzed using thematic analysis (Braun & Clarke, 2006). The number of interviews and interview partners on each level, among experts as well as biographical interview partners, are displayed in Table 1 below.

Table 1: Number of interviews by country and type (Number of interview partners per interviews in parentheses)

Source: Own illustration



## FINDINGS

The findings based on the interview data will be structured according to the timing of the (anticipated) work-retirement transition. As such, teachers had the "choice" to retire prior to, at or after the respective national pension age. The following sections will discuss how teachers made this decision; whether they perceived to have an active choice over their individual transition timing; and how factors on the institutional, organizational and individual level were thought to influence the timing as well as the perception of active choice vis-à-vis external pressure to act.

### Leaving employment prior to state pension age

There are various options that German and British teachers can pursue in order to retire prior to the state pension age of 65 and 60, respectively. This includes ill-health early retirement, if applicable, state-supported as well as self-financed early retirement options. While some of the German teachers had not yet thought of their individual exit strategy, others had already devised plans on how they wanted to accomplish and finance their early exit. Two German teachers had a clear strategy, because they were among the last cohort of teachers who could apply for a German school district-specific old-age part-time scheme that was partly state-financed and that allowed them to retire at age 63 as opposed to age 65. The motivation to apply for this old-age part-time scheme was, however, not solely based on the fact that the scheme was state-supported. Instead, eligible teachers used this scheme to mitigate the effects of changes to the institutional environment that guided teacher employment, as explained in the following quote.

Well, I was in the last cohort that could take advantage of the scheme and I thought "That is great, this is exactly what I need". This is because the working time was becoming more and more complicated with the new working time regulation. (...) it was still always a lot of work, (...). It was good that the [old-age part-time] scheme allowed me to have some extra time to prepare these lessons. I still need extra time to develop the content of these lessons. (German female teacher, age 62)

Furthermore, another German teacher elaborated more intensively on the influence that changes to the German school district´s education system and HRM policies had upon early retirement decisions. This change specifically refers to a change in the teacher working time arrangement, which foresees a working time increase.

[At the time of the decision] I did not know anything of the working time regulations for example, and of the working conditions that would make our life more difficult. (...) This was horrible - I had not known how horrible it would be, but I was glad as can be that I had already decided to leave early. (German female teacher, age 63)

Also, perceived changes to the quality and behavior of students played a role in teachers´ retirement timing choice. One female teacher especially felt that she was no longer up to the job, as students´ skill sets and attitudes had, in her opinion, changed to the negative over time. The teacher felt that younger teachers might be better suited and have better strength to deal with this change in student performance and behavior. This perspective was partly shared by other German school district and school-level interview partners. While the HR manager of the German school district did not think that there is a "right" age in teaching, some school principals found that younger teachers might have a better connection with students than do older teachers. Therefore, some school principals suggested that teachers beyond a certain age might not be fit enough anymore for the teaching profession.

I think it is nonsense that teachers are forced to work beyond age 55, because I think that there is a large gap between my own perspective and the perspective of the customers that are sitting in front of me. (German School 1, Line Manager)

While the availability of state-supported early retirement schemes, negatively-perceived changes to the teacher employment as well as ageism provided push factors out of employment into early retirement, some teachers also elaborated on pull factors that influenced their work-retirement transition decision. One such pull factor was the retirement timing of a spouse of family member, as explained below.

My husband will retire at the same time and we want to go travelling. (...) Yes, my husband will retire at age 65 - he will retire at his regular retirement age. I will be 63 then and I will leave a bit early, and I will have to accept the [pension-related] deductions. (...) retiring at the same time is quite important for us. (German female teacher, age 58)

The institutional old-age part-time scheme therefore allowed eligible German teachers to scale down and to reduce their working time - therefore providing them with additional time resources for other (occupational) tasks - without having to finance this working time reduction entirely by themselves. In addition, an important factor in this decision-making process, or at least a factor confirming this step, was a change the policies that guide German teachers´ employment situation. Nevertheless, teachers confirmed that this or other early retirement schemes were difficult to implement unless a teacher had a secure financial background. An individual´s financial situation might therefore determine whether a teacher is able to retire early using a self-financed scheme. While some teachers did not financially depend on their income due to sufficient funds provided by their partners and families, and therefore had a financial safety net to fall back on, other teachers decided to retire early, because working longer did not financially pay off. One German female teacher recounted that after the death of her husband, she received a widow pension that interfered with her teacher civil service salary. This is because salary-related earnings above a certain monthly amount lead to a reduction of the widow pension. As a consequence, she had already reduced her working time to 50 per cent. The passing away of her husband therefore provided a factor in this teacher´s private environment that, in itself, did not motivate her to plan an early retirement. Instead, her husband´s death in combination with institutional factors such as the interference between her salary and her widow´s pension led to her decision to retire early. A different case was provided by a British female teacher who was planning to retire early at age 58 because, based on the British occupational pension scheme, she could retire with a higher pension entitlement than she could if she worked until age 60. This is because she had her highest salary between 2002 and 2004, which would only be used as the basis to calculate her occupational pension entitlement if she retired within ten years after starting this high earning job. A different case was provided by a German female teacher. Even though she stated that she would prefer to retire early at age 63, she was not certain whether she would be able to do so. This is because she is a single mother with an underage child.

Well, it is my idea to retire at age 63, that is my plan, but the question is whether I will be able to do so. (...) I will have to check this with the teacher pension office. (...) This is because \*\*\* [name of son] will still be in school at this point. Well, I will decide then whether I can afford to leave early. (German female teacher, age 59)

While the examples discussed above included teachers who had themselves made the decision to retire early because of various reasons, one British male teacher had taken early retirement because it had been offered to him by the board of governors of this former school. Even though he mentioned that he had been experiencing similar stress factors as reported by German participants, he had not originally planned to retire early. However, having been offered the opportunity at age 55, he decided that it would be the right choice. Institutional-level stress factors acted as a facilitator in this decision-making process as the teacher specified that he was discontent with his workload. This was because the government would recurrently introduce new policies or suggest new approaches that required school-level input. Recurring policy changes therefore led to obsolete work. He found that this unproductive work was adding to his stress levels. This is similar to the accounts of German teachers who mentioned that they developed concepts based on state education policy changes, which were made obsolete before being implemented. The early retirement offer therefore allowed him to escape from those parts of the job that he found stressful. Nevertheless, it was decisive in his decision-making process that his British school district offered him to remain in his trade union function on a part-time basis also after early retirement - a job that he had already had a couple of years prior to taking early retirement.

Based on the discussion above, there were two main decisive factors that influenced whether teachers opted for early retirement. These are work-related stress and the existence of a financial safety net, that allows teachers to retire early. For all but one teacher, early retirement was a means to unburden themselves as they were experiencing organizationally- and institutionally-induced stress. Stress factors were student behavior; recurring education policy changes; the introduction of the German civil service working time regulation, resulting in a higher perceived workload; as well as the introduction of new media. German school district- and school-level informants confirmed that there is a connection between work-related stress and either state-financed, self-financed or ill-health early retirement.

They [teachers] know that they do not manage: "I have to do this and I still have to do that as well". And then they panic, and then they get ill, and then some people simply leave, they simply take early retirement because they cannot manage the stress anymore. (German School 1, Employee Representative)

At the same time, German employee representatives thought that stress and burnout occurred because especially older teachers do not have any resources at their disposal to counteract work-related stress. This is partly because formal or institutional stress-relief measures, that were in place in the past especially targeting older teachers, had been phased out.

A German HR manager, however, also pointed out that ill-health early retirement is expensive for the school district. Therefore, the German school district was, at the time of the interview, in the process of implementing prevention measures that aimed to counteract health problems. The German HR managers hoped that these measures as well as more frequent appraisals will help reducing disability for service cases. Indeed, one HR manager mentioned that there is a strong interest among teachers, especially for preventive measures such as health seminars. Nevertheless, she conceded that she lacked the funds to offer a sufficient number of seminars to satisfy the demand. Contrary to this account, most German teachers felt that participating in job-related training, including health seminars, was rather an additional stress factor instead of stress relief. One aspect was that teachers did not think that they had time for additional training, even though they were aware of a time allowance provided by the German school district for the participation in such training sessions. A second aspect mentioned was that teachers saw timetabling clashes between their jobs as a teacher and the training courses offered by training providers. In addition to school district-initiated measures, there are some options that schools can implement with regard to health promotion and health protection. These options can be divided in formal and informal support as well as in preventive measures and acute measures. Two examples of formal and preventive measures are health seminars and the participation in risk assessment exercises. A second option for school management teams is to offer informal support to teachers on a one-by-one basis, though the incidences reported mostly suggested that this measure is taken only if health problems become acute. Even though some institutional and school-level measures appear to be in place, the trade union representative suggested that this is not sufficient.

Well, it is our trade union perception that not much is being done for those older teachers who potentially leave the teaching profession early, because health reasons prevent them from working, or because they are, to put it bluntly, just old. This is an area of conflict [between the trade union and the school district], because it is a problem that the old-age work relief has been abandoned. (German School District level, Trade Union representative)

Overall, even though there are institutional and school-level measures to prevent health problems, teachers cited stress as a main factor in determining their wish to retire early. However, as early retirement meant in most cases a loss of income as well as reduced pension entitlements, only those teachers who had a financial safety net had the opportunity to retire early. Private financial means therefore played a mediating role in whether or not teachers could afford to retire early, and hence accept a reduced pension entitlement and loss of income. As will be seen in the subsequent section, some teachers were not able to retire early because of a lack of a financial safety net, even though they experienced similar stress factors and wanted to retire early. Therefore, health and stress-related factors might provide the motivation for early retirement, while the availability of a financial safety net is a significant prerequisite to its implementation. The cases of two teachers, however, also showed that financial reasons could lead to early retirement not as a mediating factor but in their own right.

## Leaving employment at the British occupational pension age and the German state retirement age

The following section will discuss the experiences of both German and British teachers who were aiming to work until reaching pension age, age 65 and age 60 respectively. This is specifically with regard to British teachers who could, if they wanted to, work past the occupational pension age of 60, while German teachers were forced to retire at age 65, according to the German civil service law. For British teachers it was therefore a choice to stop working at age 60, while German teachers mostly did not have this choice.

Among the German interview partners, only two teachers were planning to work until reaching the German state pension age of 65. Both did not provide a specific motivation why they were planning on doing so. However, one female teacher had just started a new job. It can be assumed that this new and challenging task provided her with the motivation to carry on working. Also, a male teacher was planning on continuing to work in the teaching profession until age 65 as he felt at ease with his job and did not report on major work-related stress. This is even though he did complain about recurring institutional change, which left teachers with work that turned out to be redundant. Nevertheless, contrary to other German teachers, he did not consider retiring early because of this work-related stress.

British teachers mentioned a variety of reasons why they had chosen to retire at the British occupational pension age. One reason was that they felt that they were stressed out as mentioned in the quotes below.

I find I am physically tired. I get physically very tired at the end of the day. (...) I am gonna retire this year anyway. I think I am too tired to carry on climbing. (British male teacher, age 59)

I mean I will actually work until I am 60 but I will retire then. (...) I don't want to carry on doing this for any longer. I think it is enough. My husband said to me the other day "Well, you have given enough". (British female teacher, age 59)

Similarly, another female British teacher´s decision to retire at age 60 was partly based on physical exhaustion. In addition to stress, she also mentioned that her family and friends had an influence on her decision to retire. She therefore wanted to change the priorities in her life.

Well I would like to retire at 60. (...) It is partly, to be honest, I am physically exhausted and I do think it has affected the way that I’ve lived my life. There are lots of things that I’ve enjoyed but I do think I owe me some time and friends and family. (British female teacher, age 58)

Indeed, even though British teachers had varying reasons for choosing to retire at age 60, most of them mentioned that stress was an important factor in this decision-making process. The British HR manager confirmed this view.

You can access your full pension, in terms of your contributions, at 60. In terms of quality of life why don’t you do that? Why do you drag yourself and do those extra years? (British School District level, HR Manager)

While the aforementioned accounts point towards a retirement conceptualization that involved the notion of retiring "at the latest" at age 60, the following two accounts regard age 60 as "the earliest" timing for this transition. A major factor for this were financial reasons such as having to pay off a mortgage or having to financially support children. Carrying on working until age 60 therefore provided them with the funds to pay for these expenditures. In addition to financial reasons, teachers mentioned that their relationship with relevant others were inhibiting an earlier retirement. While one British male teacher highlighted his feeling of responsibility for his students, another male British teacher mentioned family and household responsibilities as a factor that postponed his work-retirement transition.

I am also worried, I am not worried, I am also concerned, my wife has got a long list of jobs that she wants me to do when I retire, postpone that a bit longer. (British male teacher, age 59)

Even though teachers were planning to work up until German national or British occupational pension age, there were factors that might mediate or influence this decision. First, teachers could be convinced to bring forward their expected retirement timing. One such factor could be family-related.

Well, there is always something that could potentially alter this plan. My wife keeps nagging me that I should retire a bit earlier so that we will have a bit more time together. (German male teacher, age 58)

A second reason might be associated with changes in the political landscape, and corresponding institutional reforms that might affect the pension system. This was specifically with regard to the, at the time of the interview, upcoming national elections in Britain. Some British teachers were concerned that their pension entitlements might be reduced, if the conservative party implemented public spending cuts. British teachers felt that, in light of this uncertainty, it was a gamble to stay in work until age 60. Not knowing the outcome of the elections as well as the policy implemented by the potentially new Government left them in an insecure situation, in which they found it difficult to take a decision. Second, teachers might have to postpone their retirement transition timing due to financial reasons. A British school district-level HR informant confirmed that pension-related reasons might lead to the postponement of the retirement timing, especially for late teaching force entrants and those who had taken career breaks.

It is mature students that have come in to teaching late that often impacts on and they might start in their 30’s teaching and to get their 40 years in they’ve got to go to 68 or something like that in order to make it work. (...) Or if a woman has taken a break during teaching for child care reasons again they might want to work for a couple of extra years to get their full pension. (British School District level, HR Manager)

## Working past British occupational pension and German state retirement age

The following section will discuss whether and how teachers decide to work in their profession past the British occupational pension age or the German state retirement age. In addition, the section will elaborate on the British process of working past the school-level retirement age that was in existence at the time of the interviews. At the time of the interviews, British teachers experienced two institutionally- and organizationally-set exit timings: the occupational pension age at age 60, as elaborated on in the previous section, as well as a retirement age that was set at the school-level.

None of the German teachers was aiming or wanted to work past retirement age. Instead, most teachers were eager to leave as soon as they were able to and could afford to do so. Among the British teachers interviewed, four were aiming to or were already working past the occupational pension age. One reason for this was that teachers still enjoyed their work and did not feel ready to retire. One teacher, for example, kept postponing the timing of her retirement as there never seemed to be the right time to implement such a step.

When I was 21 I said I am not going to get married until I was 25. When I was 25 I said I am not going to get married until I am 30 and I kept putting it off. I feel exactly the same about retirement. I keep thinking "well, I ought to retire" and I think, "No". (British female teacher, age 61)

Her motivation and her driver to stay in the occupation was that she felt that she was still productive in so far as she still wanted to influence pupils´ lives. Also, she thought that she still had ample energy and enthusiasm for her job. This account differs from the interviews of German and British teachers who were considering taking early retirement or retirement at their respective occupational or state retirement age insofar as the teacher quoted above was the only one who felt that she was still motivated and enthusiastic about her job. Contrary to her, other teachers reported that they were tired, physically exhausted and were, hence, looking forward to retirement. Nevertheless, the British female teacher also thought that her positive outlook might change in the future.

No. No, it [retirement] isn't [on my mind]. (...) There may come a time when I have that choice taken away from me. If I become ill or if circumstances overtake me that I can't predict then I think it is possible that I would be forced into making that decision. (British female teacher, age 61)

While this teacher had not yet decided on a retirement date, another British male teacher had decided to retire at the time when his partner was going to retire. As he was waiting for her to do so, he felt that he could also spend his time working in his trade union representative function - a job which he enjoyed. Even though he also wanted to do other things after retirement, he did not feel that he did not have much time left, as did many of the other teachers.

No. I just think 70 is a good time. I am not worried about snuffing it too soon. We live long, all my relatives, my mother is 95 and still going strong. (British male teacher, age 67)

A different motivation for working past the British occupational pension age was a financial one. One British teacher reported that she had retired three years previously and at that time had started to draw her occupational pension, while she was still working on a part-time basis. Her motivation to work past occupational pension age was because she felt that she needed the extra income to cope with additional expenses from having bought a holiday house. Working as a teacher therefore allowed her to supplement her family income in order to establish a financial cushion for financial uncertainties due to what she called "*this particular economic period* (British female teacher, age 65)". It is important to point out that this teacher´s financial need to work was not because her pension entitlement was not sufficient, but because she and her husband wanted to be more flexible in how and where they spend their life. Nevertheless, she had only considered to work past occupational pension age when her school principal convinced her to stay on. The teacher especially highlighted that her head teacher was very positive about her staying on even though she had already officially retired and even though she herself thought that she had reached her what she calls "sell-by-date" as a teacher. The fact that her head teacher offered and allowed her to reduce her working time acted not only as an additional incentive, but also as a prerequisite for her to stay in employment.

So we agreed on two days in the middle of the week, which is ideal because it actually means that I have very long weekends if I do want to go anywhere. I mean I couldn’t possibly manage full-time ever now or not for very long but doing part-time is ideal. (British female teacher, age 65)

All teachers were therefore still enjoying their jobs, felt motivated and enthusiastic and thought that they were still providing valuable input for their pupils or, in one teacher´s case, teacher trade union constituents. Also, working provided them with exposure to an age-mixed group, which they found important also in later life. This is different to most other teachers interviewed who felt mentally and physically exhausted and who partly thought that younger teachers should take over. There was no recipe that explained why these teachers had managed to remain motivated, even though they also reported institutional- and organizational-level stress factors as well as private life problems. Nevertheless, it is noteworthy that all of them were working in a part-time capacity. Still, the opportunity to work part-time allowed them to pursue hobbies, plan alternative careers and spend time with their families. The ability to combine work with family and hobbies therefore seems to allow teachers to reduce stress factors and to adapt their (working) lives to new priorities that might emerge in later life.

There are a variety of institutional and school-level factors in Germany and Britain that hinder or facilitate whether and how teachers can work past the German state retirement age, the British occupational pension age and the British school-level retirement age. The German institutional context does not enable teachers to work past the German civil servant retirement age. This, at least, refers to teachers who want to continue working with a civil service contract. Nevertheless, German HR managers and school principals specified that individual teachers might choose to work past retirement age with a non-civil servant contract. These teachers receive a new, fixed-term contract as non-civil servant employees. These incidences are, however, scarce. Firstly, working past retirement age in a teaching capacity in Germany mainly concerns teachers who teach subjects such as Latin in which there is a general teacher shortage. Secondly, it might concern cases in which an individual school requires a long-term sick leave or maternity leave cover. At the time of the interview, only one German case study school employed former teachers in this capacity. Even though school management teams in general appeared to be favourable to this option, school employee representatives did not support such schemes.

This would be a blockade of teaching positions. These people have done their time - they can financially do without it. It is the job of the school ministry to make sure that there are sufficient qualified teachers to satisfy the staffing needs of the schools. (German School 2, Employee representative)

Employee representatives, however, agreed that retired teachers might stay on a short-term basis in exceptional situations. Furthermore, some German teachers continue to work at the school in a non-teaching capacity. Some do so on a voluntary and, hence, normally unpaid basis. These teachers are especially involved in homework support for underperforming pupils, and in extracurricular activities.

There are different reasons why German teachers engage in voluntary or paid work after reaching retirement age. Some teachers opt to do so because they find it hard to transition from employment into retirement without a transition period. The vice principal of one German case study school thought that it might be difficult for retired teachers to cope with a feeling of no longer being needed.

They were so involved in the school and in their jobs that they would fall into a deep dark hole, because they would think that they are no longer needed. (German School 2, Vice Principal)

Still other teachers want to stay active after retirement age because they want or have to earn an extra income. This might be especially the case if the teacher in question has not yet reached the maximum pension entitlement due to gap years, part-time work or maternity leave. According to the German school district-level trade union representative, teachers who work past retirement age can earn up to reaching the full pension entitlement. If they have already reached the maximum pension entitlement through their pre-retirement teaching job, they will only be able to keep 20 per cent of the new income, as the new income will be charged against the pension entitlement. Nevertheless, teachers can only work for an additional three years after having reached retirement age.

German teachers therefore experience significant obstacles if they want to be gainfully employed in the teaching profession after having reached retirement age. These obstacles are firstly based on the civil service nature of their pre-retirement contracts. Gainfully working past retirement age therefore involves a change of contract. Secondly, school district- and school-level employee representatives are apparently not likely to support schemes in which retired teachers work past retirement age. Thirdly, teachers who work past retirement age have an income cap that is based on their full pension entitlement. If a teacher has already reached his or her full pension entitlement, there are no significant financial incentives to continue to work past retirement age. Nevertheless, besides these institutional and employment relation-related inhibitors, school management teams supported the idea of employing retired teachers as short-term flexible labor force to meet staffing needs that could not be filled with inexperienced teachers.

Contrary to their German colleagues, British teachers experienced less institutional obstacles if they wanted to work past occupational pension age or retirement age. Generally, it appears as if there are no restrictions that apply to teachers who opt to work past the occupational pension age of 60. Nevertheless, at the time of the interviews, prior to the abolishment of the default retirement age, schools set a school-level retirement age policy. Once teachers reached this age, school principals normally initiated a pre-retirement process, within which teachers could request to work past the retirement age. Generally, the principals of British Schools 1 and 2 both mentioned an openness towards teachers who want to work past retirement age as "*Normally, I would consider that they should be allowed to work as long as they wanted to* (British School 2, Principal)", but did not report on any active persuasion activities. Nevertheless, the vice principal of British School 1 reported that she hardly knew of teaching staff in her school that had worked or are working past the official retirement age, despite the school´s openness to such arrangements.

Overall, teachers´ reactions vary when they reach retirement age.

I wouldn’t beg anybody to stay because if they’ve made a decision and it’s for all the right reasons then they must go. (…) If you’ve given your life to education and to the school (…) and school is everything, to finish would be impossible because it becomes your second home. So, you look at how you can support that person through that. Other people have just said, ooh I am out of here. I’m going travelling. Get in me camper van and I’m going, so different people will do different things. (British School 1, Principal)

British School 1´s principal also emphasised that the type of transition into retirement is important. According to her, teaching is a very social job, which entails a lot of personal contact. Therefore, some people might have problems adapting to a very sudden transition into retirement. She therefore advocated a combination of phased retirement and a dedicated pre-retirement preparation. Phased retirement transitions and working past retirement options are apparently negotiated individually.

According to the British HR manager, there have not been any complaints from teachers that requests to work past retirement age were turned down. Also, the trade union representative mentioned that the British School District encourages teachers who retire to consider coming back as a supply teacher. However, this is not a new policy and also not uncommon according to the trade union representative. The main incentive for retired teachers to do so is the financial compensation. Social networks do play a role, too, but since supply teachers might be placed in schools other than their own and only for a specific period of time, supply teaching does not necessarily allow retired teachers to stay in their previous work environment. Furthermore, teachers who retire can ask for a part-time contract to supplement their pension. A teacher can work part-time past retirement up until the combined salary and pension reaches and/or exceeds the salary earned just prior to retirement. Also, retired part-time teachers can voluntarily start a new pension plan based on the part-time teaching income. A new pension plan can be maintained until at least age 65. Therefore, the trade union representative concluded that there are many options for a teacher to transition into retirement as "*There are variations on a theme here in terms of what you can do in terms of retirement and part retirement and step downs and all kinds of arrangements that exist* (British School District level, Trade Union representative)."

British teachers can therefore opt to work past their occupational pension age as well as past their school-level retirement age. The latter, however, depends on the individual school´s needs, budgetary constraints and the school principal´s goodwill. While school principals mentioned that they would like to keep dedicated staff also past retirement age, only few teachers appear to have stayed on in the British case study schools. It is not certain whether the low number of teachers working past retirement age mirrors teachers´ unwillingness to stay on or the school´s unwillingness or inability to negotiate working past retirement options. Nevertheless, as institutional barriers do not exist in Britain, British teachers face less challenges than do German teachers if they want to work past occupational pension age and/or past school-level retirement age.

## CONCLUSION

This study is concerned with teachers´ perceptions, perspectives and motivations with regard to their work-retirement transition. The study found that the main retirement-related decisions being taken differ between German and British teachers, where German teachers only have the institutional option to retire prior to or at the German national retirement age, while British teachers could also apply to work past their school-level retirement age. In fact, those German teachers that participated in the study mainly chose to retire early, while British teachers´ decisions with regard to the timing of their teaching force exit varied from early retirement to retirement at occupational pension age to working past occupational pension age.

There are a variety of emerging themes that influence the work-retirement transition decision and timing. Early retirement in both countries appears to be mostly connected with institutionally- and organizationally-caused work-based stress, work-life balance reasons as well as the availability of an individual financial safety net. Not retiring early was in both countries connected with a lack of such a financial safety net. Retirement at pension age in Germany was, at least for the two teachers concerned in the sample, not based on a specific motivation. However, as the German civil service law stipulates the date of retirement at age 65, these two teachers did not have much choice to work past age 65. In Britain, where teachers could work beyond the occupational pension age as well as possibly past the school-level retirement age, the motivation to leave employment at age 60 had to do with work-based stress, family reasons as well as financial issues. Teachers in Britain therefore actively chose this age to retire as they normally had full access to their occupational pension plan and could, hence, honor their financial commitments. Another reason to work up until occupational pension age was teachers´ commitment to their schools and students. Working past occupational pension age only played a role in the British context, and those teachers aiming to do so mainly did so because they remained to be overall satisfied with their occupation and their work-life balance. It has to be stressed that all British teachers doing so were working part-time at the time of the interview. They were, hence, able to flexibly combine work with family responsibilities, though this had involved negotiations with their employers.

Based on this discussion it appears as if there are similar themes, rationales and motivations that guide British and German teachers´ anticipated work-retirement transitions. As such, retirement decisions are taken at a similar age, i.e. around age 60 in Britain and between ages 60 to 63 in Germany. It might therefore be assumed that teachers in both countries aim to leave the profession at a similar point in time of their life courses - hence teachers perceived a similar "right" timing for this transition. This is even though their actual anticipated type of retirement transition differed. British and German teachers therefore had divergent institutional and organizational opportunities and constraints that, in addition to their motivations and perceptions, guided their later life career decision-making.

It therefore appears as if the British teachers interviewed were able to actively choose their transition, and hence employ human agency, within an institutional structure that enabled them design their later life careers based on their own requirements or desires. Contrary to this, German teachers either had to adhere to a more rigid institutional structure that shaped their work-retirement transition, or alternatively had to use human agency in spite of the institutional structure to implement the work-retirement transition choices they deemed suitable and desirable. This mainly involved decisions over whether or not teachers wanted to retire early and whether or not they were willing and able to pay for this themselves by foregoing income and pension entitlements. Such a financial safety net that was necessary to take such a step was mainly based on an individual´s family situation. Hence, the application of human agency in career decisions in later life in Germany was mostly mediated by the life course element of linked lives.

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1. The wastage rate refers to those teachers who leave full-time employment at one school without taking up full-time employment at another school. [↑](#endnote-ref-1)
2. In Germany, side-entrants are university graduates who did not follow university degree programmes to become a teacher, who, however, have degrees in one or more of the skill shortage subjects. These individuals are offered to complete the second, practical, phase of the teacher training. [↑](#endnote-ref-2)
3. In Germany, "Gesamtschulen" were selected in order to most closely match the student performance structure of the respective German school with the British comprehensive school. [↑](#endnote-ref-3)