SHOULD RETIREMENT AT A FIXED AGE BE COMPULSORY?

BY

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The problem posed by the increase in the number of persons surviving beyond the age of 60-65, often referred to as the problem of ageing population, has been receiving increasing attention during the last decade. A number of conferences have been held in various countries and many papers on various aspects of the problem have been published. Some of these are referred to below.

The most important factors in the problem are:
(a) The number and the ratio to the total population of aged males and females in many countries, including South Africa, have increased at a significant rate in the past 50 years, and there is good reason to assume that this increase will continue for at least several decades.
(b) Many of these ageing persons are still able to continue in productive employment, but are removed from such employment for several reasons which are referred to later.
(c) In a number of industries and institutions skilled workers, scientists, and technicians are compulsorily retired at a specified age while difficulty exists in filling the vacancies thus created.
(d) National and private pension schemes complicate the problem.
(e) In a significant number of cases compulsory retirement at a fixed age affects the morale and health of the retired persons.

That this problem causes serious concern not only to the industries, institutions, and individuals affected by it, but also to governments and the public, is evidenced by the formation in America of such bodies as the New York State Joint Legislative Committee on the Problems of the Ageing, the National Committee on Ageing, and the McGregor Foundation.

The British Government, recognizing the importance of this matter, appointed in 1951 a standing committee of 28, composed of representatives of Government services, employers, employees, medical men, and certain important national organizations. Their reports are referred to below.

In Australia the Minister of Social Services, speaking in September, 1960, said that compulsory retirement is "a social cruelty that should never be tolerated or allowed."¹ This is quoted as an example of the concern felt by people in responsible positions about the impact of the problem of the ageing population.

Fitness for Work

Unfortunately there are no data for South Africa. However, it is reasonable to assume that there is not likely to be a large divergence from the data collected in other industrialized countries. It is, of course, clear that fitness for work depends not only on the physical fitness of the individual but also on the nature of the work and the willingness of the individual to carry on.

One survey² covered a sample of men over 70. In this group 69% of the professional classes were physically fit for work, and one-third of these were fully employed. In the unskilled working-classes only 20%

were regarded as fit for their particular classes of employment, but many of those not so fit were still at work because of economic pressure. Most of the unfitness in the latter group was due to a much higher incidence of chronic bronchitis than in the professional group.

A survey of old persons was carried out by S. L. Pressey,³ of Ohio University. He examined his own records of 230 "superior older persons" and 127 reports on such subjects collected by his students. All the subjects were over 80 years of age, nine of them being over 90. He also collected from the press 167 validated reports of old persons carrying on their usual occupations. He found that 313 persons, all over 80, of whom 23 were over 90, were gainfully employed, but those over 90 were working only part-time. The latter group included 2 clergymen, 4 physicians, 3 laymen, and a receptionist (a woman of 94). Among those over 80 but under 90, 3 were journalists, 18 physicians, 12 buyers, 24 skilled artisans, 8 farmers, 8 shop-owners, 3 clerks, barbers, handymen, etc. A number were quite capable of working, but preferred for personal reasons to retire completely.

Pressey reminds us that although Gladstone was Prime Minister at 84, that Holmes was Chief Justice at 90, and that Tennyson wrote *Crossing the Bar* at 80, and Humboldt the *Cosmology* at 89, these, and the survey, prove no more than that there are people in all work categories who continue, or could continue, at useful work in the ninth and tenth decades of life.

With the co-operation of 11 Birmingham general practitioners, 691 men of 70 years and over, from a total of 838 men of this age-group on their lists, were specially examined as to their fitness for employment.² Included in this group were men in all categories of occupations: 136 were in social classes I and II, 394 in class III, and 161 in classes IV and V. As regards disease incidence, the only significant difference between the classes was the prevalence of chronic bronchitis: 15.4% in classes I and II, 21.6% in class III, and 31.1% in classes IV and V.

Percentage of Men Considered to be Fit for Full-time Employment, by Social Class

	I	II	III	IV	V	Total
Fit for original work	66.7	54.5	33.0	29.3	21.5	35.9
Unfit for original work, but fit for other employment	12.5	10.7	18.8	17.0	19.0	17.1
Unfit for full-time employment	20.8	34.8	48.2	53.7	59.5	47.0
No. of men	24	112	394	82	79	691

Percentage of Men Considered to be Fit for Full-time Employment, by Age

	70-74	75-79	80-84	85+	Total
Fit for original work	49.1	27.2	22.6	6.4	35.9
Unfit for original work, but fit for other employment	19.8	20.2	7.5	2.1	17.1
Unfit for full-time employment	31.1	52.6	69.9	91.5	47.0
No. of men	338	213	93	47	691

Extract from the authors' summary: "The proportion fit [for full-time employment] was two in three in ages 70-74 and one in two for the whole sample of men at all ages over 70. About half of those considered fit were fully employed. The proportion of fit men at all ages over 70 was much higher in class I (4 in 5) than in class V (2 in 5)."

Important in the study of the problem of fitness for work are data of loss of working-time due to absenteeism because of illness and accidents. The following extracts from reports of investigations in this subject are therefore cited.

D. S. Pugh, C. Gordon, and K. Lévy⁴ report the results of their investigation of clerks over 45 years of age, employed by Scottish Railways: 177 chief clerks with considerable responsibility, 391 senior clerks on routine with some responsibility, and 692 clerks on routine work.

Average Number of Days Per Person Lost in Year

Grade	45-49		50-54		55-59		60-64	
	No.	Days	No.	Days	No.	Days	No.	Days
Chief clerk	30	2.73	46	7.70	69	9.80	32	4.00
Senior "	53	7.08	138	9.03	150	13.71	50	12.94
Clerk	144	11.11	287	11.49	204	15.22	57	15.74

The authors remark that the records of the London Transport Board show the same trends for these age-groups. They draw attention to the point that the salaries paid to the three groups of clerks do not vary greatly: a "clerk" may be paid as much as a "chief." The range of salaries in the three groups is small—£540 to £731.

C. Gordon, A. R. Emerson, and D. S. Pugh⁵ report the sickness records of 27 grades of employees of the Scottish Railways. Grades in which employees were predominantly under 25 years of age were not included. The records of the nine largest departments of the total of 20 were used. The grades were:

Manual.—Little responsibility. Sheltered from weather—e.g., workshop. Not sheltered from weather—e.g., way maintenance.

Manual.—With some responsibility. Sheltered from weather—e.g., luggage-room attendant. Not sheltered—e.g., shunter.

Manual.—Considerable responsibility. Sheltered from weather—e.g., shop-fitter. Not sheltered—e.g., locomotive driver.

Sedentary.—(a) Little responsibility. (b) Some responsibility, but more or less routine. (c) Requiring considerable initiative.

Administrative and Supervisory.—Exposed to weather—e.g., station-master, yard inspector, permanent-way inspector.

Total man/days available for study, 4,025,164.

Days lost in the year, 116,742.

Proportion of time lost, 2.90%.

Period of study, one year from April 1, 1955.

Sickness Experience by Age

Age Groups:	40-	45-	50-	55-	60-	65+
Sick person rate	0.27	0.28	0.31	0.33	0.34	0.27
Episode rate	0.42	0.48	0.48	0.52	0.53	0.33
Average duration per person (days lost in the year)	5.89	8.12	9.52	13.78	15.04	9.75
Average duration per sick person (days lost in the year)	25.94	28.52	31.13	41.18	43.75	35.50
Average duration per episode (days)	16.28	17.04	19.66	26.31	28.59	29.24
Average number of episodes per sick person	1.59	1.67	1.58	1.57	1.53	1.21

"Episode" means each separate attack of illness.

The authors suggest that the better data for the 65+ group are due to "weeding out." The next table appears to substantiate this view.

Percentage of Railway Research Population Leaving Service at Each Age for Health Reasons (Including Deaths and Fatal Injuries)

Age groups	20-	25-	30-	35-	40-	45-	50-	55-	60-64	All
Percentage	0	0.2	0.1	0.3	0.5	0.8	0.9	2.1	2.9	0.9

It is regrettable that there are no South African data on this aspect of the problem.

A fair comment on these, admittedly limited, data is that there is no strong reason against *continuing* in employment men over 65 years of age because of any probability of a higher rate of loss of time due to illness.

Studies and Attitudes in Great Britain

The committee of 28 members appointed in 1951 reported in 1953 and in 1955.⁶ This committee stated that economic conditions and shortage of skilled labour caused many employers to retain the services of men over 65, and that in professional, managerial, and executive personnel "the full extent of resulting wastage of ability (due to compulsory retirement) is not known." The committee recommends that all concerned should consider modification of the existing practice to prevent losing efficient men.

H. M. Clay's booklet⁷ published by the Department of Scientific and Industrial Research, London, 1960, reviews the problems involved in the employment of the older worker. The following is a summary of the views stated. (1) The experience of the older worker often enables him to get more out of a machine or process. (2) He is likely to be more accurate. He may be slower, but this may be compensated by accuracy of production and non-waste of material. (3) When not debarred on medical grounds, the older workers find the demands of heavier work less trying than lighter work at high speed. (4) Mental changes due to ageing may reduce efficiency when the job calls for exercise of memory or for altering or interpreting information before taking appropriate action. (5) The general experience is that there are fewer accidents among older workers. There are exceptions to this, such as where good eyesight is important, or where there is exposure to high temperature. The findings among colliery miners are that older men have fewer accidents at work at 70° F. (21.1° C.), but more in higher temperatures.

F. Le Gros Clark,⁸ after giving the economic reasons for continuing older men in employment, writes: "But of even greater significance, perhaps, is the growing medical evidence we now have that satisfying occupations help to prolong the physical and mental health of elderly men." And: "It becomes obvious again that we can no more certainly generalize about the types of work in which ageing men are likely to be employable than we can about the rates at which they variously grow old."

The above summarizes the informed opinion held by many other well-informed persons.

Studies and Attitudes in U.S.A.

In the United States there is much interest in the study of the problem of the older worker. This is evidenced by the establishment of several organizations for the study of this problem, by the research undertaken by universities, and by the large number of reports issued by these bodies, by the U.S. Department of Labour, and

in the published proceedings of conferences convened on a national level.

The New York State Joint Legislative Committee on the Problems of the Ageing assert in their report: "Many employers are seriously considering the problem . . . and retirement policies are still fluid enough to warrant the belief that they can eventually be adapted to the individual need of the persons they cover."

John L. Springer⁹ writes: "We talk of educating our youngsters in science, but we neglect the obvious truth that a scientist in the hand is worth two in the cradle." He then states that half of 325,000 engineers and 90,000 scientists over 65 years of age are retired. As an example of how professional men can be usefully employed he cites the following: The Hastings Law School of the University of California adds to the faculty *only* professors who were retired by other universities. The average age of this faculty is 75. Pound, dean of the Harvard School of Law, is quoted as having said that Hastings has the strongest law faculty in the country.

Margaret Gordon¹⁰ states that in the United States compulsory retirement at a stated age is the prevailing practice among the larger employers. Among the reasons given for this practice are: (1) it avoids discrimination; (2) older workers are less productive and flexible; (3) it provides avenues for promotion; and (4) it encourages employees to plan ahead for retirement. She points out that the problem of retirement is complicated in the United States by the law which deprives a person earning more than \$100 a month of social security benefits, and concludes: "The study suggests that top managements of larger firms might be more receptive to raising the retirement age than to a more flexible policy."

An important conference was convened jointly by the McGregor Foundation, the National Committee on Ageing, and the National Social Welfare Assembly. The participants are stated to have included "representatives of industry, labour, government agencies, research staff of universities, psychiatrists, physicians and others who have an interest in the welfare of older workers. It was possible to get an informed and unprejudiced discussion."¹¹

The participants were selected, and were supplied some time before the conference with three monographs: "Retirement from the Point of View of the Workers"; "Responsibility of Employers, Workers, Unions and Government"; "Economic Problems of Retirement." Having regard to the careful briefing of the participants, their selection, and their personal status, the views expressed and recommendations arrived at may reasonably be regarded as of particular value. They are therefore recorded here at some length.

"That resolving the problems of our ageing population is of vital importance to our future national economy is attested by the continual active interest of all, especially the leaders of management and labour."

"It was clear at the end of the Conference that retirement is not just a matter of pension or other income. Whether or not a man works may affect his health, happiness, prestige, social status, living conditions, family, and relationships."

The majority were in favour of a flexible policy of retirements. Their reasons for this were stated as follows: "(1) Science and experience indicate that the ageing process and its effects show such wide variance among individuals

as to destroy the logic of age as the sole factor in determining whether a person should retire or continue to work. (2) There is ample evidence that arbitrary retirement results in hardship for a substantial number of elderly individuals. (3) A flexible retirement policy is consonant with the philosophy of maximum utilization of the country's resources."

A minority favoured retirement on the basis of age alone. The reasons given were: "(1) The worker should have a period of rest at the end of his life, while still physically fit to enjoy it, and a fixed retirement age provides the best incentive to prepare for satisfactory retirement. (2) A plan based on chronological age is simple to administer, and until more objective criteria are developed it is the only basis for impartial decisions about individual retirement. For this reason it is the best device now available from the point of view of employer-employee relationship."

The following principles were generally agreed, regardless of the merits of arbitrary or flexible retirement. "(1) Selective retirement policies can be expanded in industry only proportionally to the success of working out a method that will permit the retention of the competent and retirement of the incompetent. (2) The policy must be acceptable to both management and employees. (3) Chronological age will continue to be a factor in the consideration of retirement. (4) That retirement at a fixed age, or flexible, presupposes a pension related to previous income. (5) That the worker should have the right to retire at a fixed age, if he so desires."

In a closing speech the chairman of the Planning Committee said: "However, among the participants in the discussions there were several having direct experience with the administration of selective retirement plans, and who know from experience that the administration and personal complications were not the monsters they were made out to be." He quoted "the sage advice" of a chairman of the board of one of the largest corporations: "Never let administrative convenience dictate your policy."

The chairman of the Conference concluded his closing remarks with: "Most of the participants agreed that retirement based on chronological age is socially unwise and economically unsound."

The National Industrial Conference Board, New York, reports on a questionnaire survey of 319 "nationally important corporations." Most of these were manufacturing, but there were included also corporations engaged in transportation, insurance, banking, and public utilities: 45% reported their policy as mandatory retirement at 65, and 55% reported policies of permissible retirement at a later age.

This report states: "It seemed probable that in the second group the actual retirements were not much over 65. The thinking that the retirement of one person means a job for another is not always valid. This does not always follow. It also completely ignores the effect on the economy of discarding ability, skill, experience, judgment, and leadership. A good scientist or teacher, mechanic or artisan, manager or salesman, does not suddenly lose his competence on his 65th birthday. Some employers, especially in situations where certain skills are in short supply, are taking a new look at a retirement policy which automatically eliminates employees on the single criterion of age."

The following are two extracts from a 147-page typed document prepared by the International Labour Organization, Geneva, in 1954, "The Age of Retirement." This document exhaustively and expertly reviews every aspect of this complex problem. "There must be a change of attitude among employers and the public if the habit of attaching too much importance to workers' chronological age instead of looking for

their qualities and experience is to be overcome. Successful publicity campaigns have been organized in a number of countries to put this across." "A steady growth over time in the proportion of aged persons might produce a dangerous secular decline in manpower resources and productive capacity of a country, unless an increasing number of aged workers remain in employment."

Conclusion

Study of the sources and data reviewed herein, and of much other material, provides very strong evidence that in both Great Britain and the United States the trend of opinion is that the time has arrived for a thoughtful reconsideration of the customary, and particularly the compulsory, chronological retiring-age. Some of the reasons in favour of a fixed chronological retiring-age which might have been valid half a century ago are now invalid. Among these are some economic considerations, such as finding employment for the younger generation and that after a given age there is invariably, or at least in the majority of persons, so great a deterioration of physical and/or mental capacity as to make their employment unprofitable, and possibly hazardous to themselves and fellow workers.

There are certain drawbacks to the withdrawal of a fixed retirement age. Some of these are listed in the minority report of the conference convened by the McGregor Foundation (see above). The importance of these reasons must be weighed against the reasons in favour of flexibility. The administrative difficulties of a flexible policy, especially if applied to scientific, technical, and managerial personnel, can surely hardly be weighty enough to outweigh the advantages, especially where there is a clear shortage of such personnel and no reasonable probability of the position being much ameliorated in the foreseeable future. The import of the last statement can scarcely be ignored in South Africa, with its very rapid increase in the number of persons over 65, and with its special need to supply leadership for the advancement of the Africans.

It seems pertinent to close this memorandum by suggesting that Mr. John L. Springer's remark (see above) is a message South Africans may well ponder seriously: "We talk of educating our youngsters in science, but we neglect the obvious truth that a scientist in the hand is worth two in the cradle." And this applies not only to scientists.

It must be pointed out that this memorandum is not concerned with the many special problems which have to be faced in a discussion of national retirement or old-age pension schemes; the concern is solely with the presentation of available information bearing on the advisability or otherwise of retaining able-bodied persons in employment beyond the usual retiring-age, particularly of scientific and skilled workers, technologists, and clerical and administrative personnel; and whether there is a likelihood of there being a sufficient number of such persons in the population to make a policy of flexible retirement age worth while and beneficial.

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GENERAL-PRACTITIONER MATERNITY BEDS IN A LARGE GENERAL HOSPITAL

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General practitioners are most keen to practise the art of midwifery with full hospital facilities at their disposal. Great attention is paid to this matter at various meetings of general practitioners, and in particular at the Annual Representative Meetings of the British Medical Association, where resolutions are passed almost annually demanding access for general practitioners to midwifery beds in hospitals, with full co-operation from the other hospital departments. A scheme of this type has been started at Kingston Hospital; and here I give a report of the first thousand cases delivered by general practitioners, compared with 1,763 delivered in one year on the other side of the department.

Kingston Hospital is a large general hospital of 534 beds. There is a maternity unit of 99 beds, recognized by the Central Midwives' Board as a first-part training school, under the supervision of Mr. A. B. Stenhouse and myself. In 1953 we decided to give 11 beds for the use of 20 general practitioners in the Surbiton/Kingston area. The opportunity to allow general practitioners to work in the Kingston Hospital arose when 11 maternity beds in Surbiton Hospital had to be closed because of staffing difficulties. At this time the Surbiton maternity unit was staffed by a consultant and 20 general practitioners. I discussed the possibility of replacement of the 11 beds lost to the general practitioners at the Surbiton Hospital with beds in the large maternity unit at Kingston Hospital, and my colleagues and the other authorities agreed to this. There were, however, many difficulties to be overcome before the general practitioners' unit could start. The sisters were worried, at first, regarding how they could divide their time between the larger main part of the department and the general practitioners coming in at various times of the day to see their patients. In spite of this we started the experiment, and I am glad to say it has been a success.

Departmental Rules

Before we started this unit a subcommittee, consisting of consultants from Kingston Hospital and