



'To be a Player, not a Piece': LMX-Relationships in Late-career Employment¹

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ABSTRACT

This study employs qualitative interviews with employees (50+) and managers from Norwegian private companies to investigate how retirement age norms affect leader–member exchange (LMX) relationships in the late stages of employment. This research reveals that organizational practices incentivizing early retirement establish retirement age norms and create pressures that significantly impact the LMX dynamic. Employees perceive managers as key in alleviating these pressures. However, the ability of managers to shield employees from retirement pressures varies, as managers face several competing challenges, such as providing opportunities and development for younger employees. While high-quality LMX relationships are crucial in reducing retirement pressures for older employees, differing managerial practices lead to varied support levels within the same organization, putting older employees in precarious positions. The article advocates for policy reforms that limit organizational early retirement practices and promote extended working lives, ensuring a more supportive employment environment for aging workers in private organizations.

KEYWORDS

Aging workers / early retirement practices / extended working lives / leader–member exchange (LMX) / managerial challenges / retirement age norms / retirement pressures

Introduction

Nordic countries have taken the lead in implementing inclusive labor market policies and comprehensive pension reforms to ensure long-term sustainability and flexibility in the transition from work to retirement (Halvorsen 2021). However, despite these proactive measures, declining employment rates are observed as individuals approach the ages of 60, 65, and 70 years (Halvorsen 2021). This trend points toward an untapped pool of potential employment opportunities.

Given that norms around aging and retirement are primarily shaped within the workplace rather than at the policy formulation level (Mulders et al. 2017; Vickerstaff & Van der Horst 2021), the workplace environment emerges as a crucial area of focus. Albertsen et al. (2024) posited that the trust between management and employees is critical to successful senior policy. However, research reveals a gap between the expected role of managers in assisting older subordinates in prolonging their careers and their actual capacity to do so.

¹ You can find this text and its DOI at <https://tidsskrift.dk/njwls/index>.

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Evidence suggests that a managerial style integrating mentorship, training opportunities, and flexibility can effectively retain older employees and delay their retirement (Davies et al. 2018; Knies et al. 2015; Vickerstaff 2006a, 2006b). Furthermore, managers are proposed to play a vital role in motivating older employees to acquire new skills, foster professional development, and extend their careers (Wainwright et al. 2019).

On the flip side, some studies underscore managers' hesitance to retain older employees (Conen et al. 2014; Karpinska et al. 2013) and their reluctance to discuss their retirement plans (Henkens et al. 2009; Van Dalen et al. 2010). Moreover, younger managers have been found to lack an understanding of the leadership needs of older employees, raising concerns about the future management of an aging workforce (Karpinska et al. 2013; Thorsen et al. 2016).

Analyzing the dynamics of leader–member relationships within the workplace is essential to better understanding this misalignment. This study will draw on insights from leader–member exchange (LMX) theory to examine how these relationships are shaped in contemporary workplaces during late-career employment.

The LMX relationship centers on the quality of relationships between leaders and employees (Graen et al. 1982; Yukl et al. 2009). Within the LMX framework, the quality of the leader–member relationship is determined by the exchange of resources, including information, tangible items, and emotional support, which benefit both parties. High-quality LMX relationships are characterized by trust, respect, and the expectation of future returns (Bauer & Green 1996; Graen & Uhl-Bien 1995). Conversely, low-quality LMX relationships are limited to the exchanges specified in the employment contract or formal job description (Liden et al. 1997). High-quality LMX relationships have consistently been linked with positive employee outcomes, such as increased job satisfaction, heightened organizational commitment, and reduced turnover (Flickinger et al. 2016; Harris et al. 2005; Portoghese et al. 2015).

However, establishing and maintaining high-quality LMX relationships can be intricate due to various contextual workplace factors (Green et al. 1996; Liden & Antonakis 2009; Oc 2018). At the organizational level, culture and climate shape the context of these relationships by providing a framework of cues that establish the organization's rules, procedures, and communication norms (Johns 2006; Oc 2018). Leaders often conform to these established organizational norms when developing LMX relationships (Douglas et al. 2003).

Within the context of late-career employment, research has indicated that established corporate retirement age norms, which concern the appropriate retirement timing for older employees, become increasingly influential as employees age (Moen et al. 2017). Individuals at various levels of the organizational hierarchy express and adhere to these retirement age norms. This includes top managers (Mulders et al. 2017), middle managers (Karpinska et al. 2013), colleagues, and even the senior employees themselves (Wainwright et al. 2019). Consequently, local 'retirement cultures' may develop in different workplace settings (Mulders et al. 2017). This could potentially influence how the dynamics of the LMX relationship unfolds between managers and older employees. However, as Truxillo and Burlacu (2016) highlighted, there remains a notable research gap specifically concerning the role of LMX relationships in late-career employment. Hence, the overarching research question of this study is as follows:

How do organizational retirement age norms influence the leader–member exchange (LMX) relationship during late-career employment?

To comprehensively address this research question, this study will employ a qualitative methodology involving collecting experiential data from employees aged 50 years and older and managers overseeing older employees within two private companies in Norway. This approach enables the study to capture older employees' experiences and perspectives regarding their immediate supervisors' influence on their late-career paths. Moreover, it allows for an in-depth examination of managers' experiences in handling their subordinates' late-stage careers.

Theory

The leader–member exchange relationship in late-career employment

LMX theory provides insights into the relational dimension of leadership. It underscores that the effectiveness of leadership is determined by the quality of interactions and exchanges between leaders and members (Graen & Uhl-Bien 1995), influencing how employees evaluate themselves in their work environments (Cogliser & Schriesheim 2000; Liden et al. 2006; Nishii & Mayer 2009). LMX theory posits that leaders develop differentiated dyadic relationships with their members (Liden et al. 1997). The interactions between the leader and members are evaluated in high- and low-quality exchanges (Graen & Uhl-Bien 1995; Nishii & Mayer 2009). High-quality relationships are characterized by mutual trust, respect, and a sense of shared commitment, where both leaders and members perceive the other party as reliable and valuable contributors. Conversely, low-quality relationships are characterized by a lack of mutual trust, communication, and collaboration, making members feel excluded and undervalued (Graen & Uhl-Bien 1995; Nishii & Mayer 2009). In other words, dyadic relationships can range from low-quality transactional to high-quality socioemotional relationships (Bauer & Green 1996; Graen & Uhl-Bien 1995). There are several reasons to believe that high-quality LMX relationships can significantly benefit employees' well-being in later careers and their inclination to prolong their careers.

First, high-quality LMX relationships are strongly linked to organizational resources such as salary progress, tasks, and career advancement opportunities (Erdogan & Liden 2002; Wilson et al. 2010). Research has demonstrated that access to various resources highly influences employees' well-being during their late careers (Müller & Weigl 2017). For instance, personalized agreements between individual employees and their employers have been highlighted as valuable resources for prolonging employees' careers (Hornung et al. 2014; Rosen et al. 2013). Research has further suggested that leaders who show consideration are more likely to successfully negotiate agreements that offer professional development opportunities and scheduling flexibility for their older subordinates (Hornung et al. 2011). Therefore, it is reasonable to infer that high-quality LMX relationships can equip employees with various resources to extend their working lives.

Second, high-quality LMX relationships are associated with psychological empowerment, work engagement, and reduced psychological withdrawal (Aggarwal et al. 2020). This association is noteworthy because individuals working beyond the traditional retirement age often exhibit high work engagement and effort (Hellevik & Herlofson 2020). Despite the lack of research establishing this relationship, it is reasonable to assume that managers who actively promote the development of high-quality



LMX relationships among late-career employees can positively influence work engagement and the inclination to continue working beyond retirement age.

Third, several studies underscore the pivotal role of middle managers in motivating older employees to prolong their careers (Knies et al. 2015; Leisink & Knies 2011). Although no research has directly investigated the correlation between high-quality LMX relationships and employees' inclinations to extend their careers, empirical evidence firmly establishes a robust connection between high-quality LMX relationships and workplace inclusivity (Brimhall et al. 2016). Managers who regard their members as significant contributors to the organization enhance their sense of inclusion and value within the workgroup (Brimhall et al. 2016; Teo et al. 2022). When older employees feel valued and included by their managers, they also experience increased feelings of acceptance and recognition from their colleagues (Brimhall et al. 2014; Murphy & Ensher 1999; Nishii & Mayer 2009; Schyns et al. 2005). This should be regarded as a valuable asset, particularly given the substantial body of research demonstrating that older employees encounter age stereotypes in the workplace (Posthuma & Campion 2009). However, managers can be confronted with conflicting priorities when managing older employees. In private companies under financial pressure, the necessity for cost-cutting and operational efficiency often takes precedence to ensure profitability. Additionally, 'financialization' exerts its influence, where decision-making is guided by financial metrics, sometimes prioritizing short-term gains at the expense of long-term sustainability (Thompson 2003, 2013).

Consequently, companies may implement early retirement incentives, such as gift pensions and severance payouts, and target older employees for downsizing to mitigate labor costs and streamline operations. While such measures can offer companies immediate relief, their long-term ramifications can significantly impact workforce dynamics, productivity, and organizational culture. For instance, despite the ostensibly voluntary nature of incentive programs, many individuals who opt for early retirement often perceive it as involuntary (Paul & Townsend 1992).

Mulders et al. (2017) highlighted a correlation between organizational behavior toward older employees and the retirement age norms held by top management. This suggests that when older employees are incentivized to retire early, it may indicate that top management espouses low retirement age norms (Mulders et al. 2017). This can inherently conflict with lower-level managers' ability to assist older employees in extending their careers, especially considering the implied trickle-down effect of age-related workplace norms from top management to lower-level managers (Mulders et al. 2017).

In light of the retirement-related organizational pressures that older employees may face (Vickerstaff 2006a, 2006b), Gjerde and Alvesson's (2019) depiction of middle managers as 'umbrella carriers', shielding their subordinates from potentially harmful directives emanating from top management, may gain added relevance in the context of managing older employees.

Materials and methods

This study is a part of a larger Norwegian research project funded by the Research Council of Norway, which involves collaboration among multiple researchers exploring interconnected themes. This paper utilizes qualitative interviews conducted by four

research team members, including the author, who collectively undertook the responsibility of data collection and analysis of the qualitative material within the overarching project. This collaborative team approach ensured the achievement of high-quality interviews, comprehensive coverage of relevant topics, and the integration of multiple perspectives in the subsequent analysis, thereby ensuring the validity of the findings (Smith 2015).

The dataset analyzed for this paper comprises interviews with employees, middle management leaders, and human resource (HR) personnel from two private sector companies in Norway. These companies operate within the technology and finance sectors and possess substantial workforces, each exceeding 500 employees. While the company divisions are geographically dispersed throughout Norway, most of the study participants were in the Oslo region.

The firms were selected based on pre-established criteria, including company size, specifically targeting organizations with over 500 employees. This ensured the presence of a dedicated personnel department responsible for managing policies and HR practices; additionally, the selection favored privately owned companies. Geographical location played a role, with a preference for companies based in the capital city.

To gain access to the target companies, we initially established personal connections with HR specialists and organized collaborative meetings to propose the project and explain the inclusion criteria. As Patton (2014) outlined, purposeful sampling was employed to identify participants from each company that met the research objectives.

For the employee interviews, the focus was on older employees. Following the lead of recent empirical research (Choi et al. 2020; Jiang et al. 2022; Peters et al. 2019), we defined older employees as individuals aged 50 years or older. This age criterion was chosen to align with the literature and capture a meaningful segment of the workforce in the later stages of their careers. Furthermore, participants were required to have a minimum of five years of tenure at the company. This criterion allowed for a comprehensive understanding of employees' experiences and perspectives over an extended period.

Regarding the manager interviews, the target participants were middle managers who occupied positions between top executives or senior leadership and front-line employees. Since this study aimed to examine the relationship and interactions between managers and older employees, it was important for the participating managers to have experience leading and managing older employees.

Before interviewing managers and employees, interviews were conducted with one manager from each participating company's HR department. These interviews focused on gathering comprehensive information about company demographics, organizational structure, senior policies, and potential initiatives impacting older employees. The aim was to map out the broader organizational context rather than to explore the organizations' rationales behind their senior policies. The interviews helped us formulate targeted questions for leaders and subordinates, allowing us to explore how HR initiatives influenced their experiences in managing or navigating late-stage careers within the organizations. Two semi-structured interview guides were then developed to provide flexibility in exploring individual contexts and experiences relevant to the project—one for employee interviews and the other for management interviews.

The employee interview guide asked about their age, education, and tenure. It then asked about their reflections on various topics, such as managers' approaches to aging in the workplace, retirement norms, reskilling, and ageism experiences. The participants

were also asked to reflect on recent or ongoing reorganization projects and how they may have influenced their decisions to stay employed.

The interview guide developed for managers centered on managing older employees. It covered senior organizational policies, retirement norms, corporate downsizing, cooperation and socialization across age groups, displacement of older employees, and retirement rituals.

Table 1 Overview of participants (N = 31)

	Employees (>50)	Managers (personnel and HR)
Finance	12	4
Technology	8	7

Each interview lasted approximately 60 minutes and was audio-recorded. Because of the COVID-19 pandemic, most interviews were conducted using Zoom or Teams, except for two, which were performed by telephone at the respondents' requests. For the platform-based interviews, all participants turned the camera on. The interviews were completed during May and June 2021. All audio recordings were transcribed.

In some instances, the participants overlapped in the employee and manager categories because employees tend to move into managerial positions over the years. Some older employees have had previous experience as managers, and managers are also employees. The participants in the manager category may share their experiences as older employees, and participants in the employee category may comment on the leadership perspective based on their previous experiences. These instances will be clarified.

The present study adopts an exploratory approach within the interpretivism paradigm, aiming to deeply understand the research topic (Blaikie 2007; Doldor et al. 2017). The dataset underwent an analysis process following the phases of thematic analysis outlined by Braun and Clarke (2006, 2022). The entire data set was systematically examined with equal attention to each item. Finally, themes were developed by grouping the relevant codes to classify the phenomena.

The national setting and company context

In Norway, the employment ecosystem operates under strict regulations applied to all study participants, including employment protections, welfare benefits, and trade unions (Hansen et al. 2018; Olsen et al. 2010). According to the Norwegian Working Environment Act, employees are protected from dismissal until they reach the age of 72, although private companies may set a lower internal age limit of 70.

Norwegian policymakers have introduced measures to extend working life and address the challenges of an aging population. One such measure is the 2011 pension reform, which encourages employees to continue working beyond the minimum retirement age by offering flexible retirement options between 62 and 75 years of age, with actuarial neutrality and longevity adjustments (Grødem & Kitterød 2022).

Private sector employees may also be entitled to a contractual early retirement pension (AFP) upon reaching 62 if their company is part of a collective bargaining agreement that includes the AFP scheme. Once such an agreement is in place—all employees are generally covered. However, to be eligible for the AFP scheme, employees must have

worked for a qualifying employer for at least 7 of the last 9 years by the time they turn 62 (Grødem & Hippe 2021; Hippe et al. 2017).

Overall, the conditions of the pension system provide employees with strong financial incentives to continue working for as long as possible. Since all employees in this study work for private companies offering AFP, they also have strong economic reasons to stay with their current employer or another private sector employer that provides AFP as they approach retirement. On the other hand, employers face no direct incentive to retain older employees despite political pressure.

Results

Employee perspective: Retirement age norms and the role of the immediate manager

Within each company, measures are in place to provide older employees with benefits that can potentially extend their careers. For instance, in the technology company, a policy allows employees to transition to a reduced work schedule while receiving a salary proportionate to their working hours. This arrangement also includes a full pension accrual, which ensures ongoing financial security for these employees.

Similarly, the finance company has provisions for older employees to work at a reduced capacity while retaining their full salary, provided there are valid social or health reasons for reducing work hours. In addition, the finance company has implemented further support measures for older employees. These include offering shorter working hours for employees beyond a certain age and providing opportunities for individuals at risk of illness to exercise during working hours. These measures demonstrate a commitment to maintaining older employees' health and well-being, potentially enhancing their ability to extend their careers.

However, both companies implemented strategies that starkly contradicted the intention of their employee retention measures. They offered substantial financial incentives for early retirement, such as gift pensions and high severance payouts. These practices provided significant financial motivation for early retirement. Consequently, a corporate retirement age norm of 62 years was established, as evidenced by statements like this: '...the company is happy to push you out when you reach 62. In a way, that's the norm. It's well organized with contractual pensions (...). You don't have to work long past 62 before it becomes unprofitable' (employee, technology).

Thus, despite supportive measures designed to assist older employees in prolonging their careers, the financial incentives for early retirement significantly undermined these efforts. Some employees openly stated feeling too young for retirement and wished to continue working if not for the pressure to depart. This underscores employees' perceived lack of control over their work departure timing. The assumption among employees was that reaching the age of 62 signified termination of their employment:

I don't feel anyone wants me to quit, not at all; it's more that I somehow sense it when there's talk about corporate plans, 'Where are we going to be in 2024?' It makes me think, 'How old will I be then? Oh, I'm not going to be here; I'll have been removed' (...) It's not okay; I don't want to leave at 62, but no one will ask me what I want. ... (Employee, technology)



If you don't feel you are wanted, then ... The general impression comes from the top. Still, the immediate manager can make a considerable difference ... if your manager wants you to continue working, makes some arrangements, and provides some flexibility ... The primary manager is vital in that sense. (Employee, finance)

These excerpts illustrate employees' acute awareness of the broader organizational strategies aimed at phasing them out, leading them to feel superfluous as they grapple with the challenge of envisioning themselves within the organization's plans. They also underscore the perceived crucial role that managers could play in initiating conversations about employees' career aspirations and desires, particularly as they approach retirement age.

While the overall perceptions about retirement and aging in the workplace may originate from the top, immediate managers were viewed as significantly influencing employees' decisions to extend their working lives. Managers who were perceived as expressing a desire for their older employees to continue working and who provided flexibility were able to foster a sense of value and belonging in employees. This highlights the potential role of immediate managers in shaping inclusive work environments and being supportive of older employees, even when faced with organizational pressures to retire.

Management challenge: Facilitating a dignified career end for older employees

The interviews indicated that managers generally acknowledged the corporate strategies of early retirement as a means of pushing employees out at the age of 62 years. However, their level of critical reflection on their role in supporting or reinforcing the established corporate retirement norm varied. Older managers demonstrated a higher level of awareness regarding how these norms influenced older employees' retirement decisions, primarily stemming from their own experiences of aging. Hence, they were more hesitant to implement exit strategies targeting older employees, given the challenge of balancing the corporate mission of creating opportunities for younger employees with the practicalities of managing an aging workforce:

[Company] has an aging workforce, and I encountered this problem many times when I was a manager. You want replacements; you want to create room for the younger workforce. That can be challenging, especially now that I'm getting older myself. (Manager, technology)

Older managers, who were also older employees, appeared to have a heightened reluctance to implement practices that could potentially lead to the exclusion of older employees from the workforce. Therefore, they tended to resist or oppose these policies, perceiving them as threats to their status. A soon-to-be-retired manager voiced concerns about the company's pressure on older subordinates to accept severance packages. She advocated for a strategy that reassured older employees of their value to the company and was careful to tell her older subordinates that accepting the packages was optional:

It's his decision, but I'm concerned he shouldn't feel he has to accept that package. Even though he is encouraged to do so by the administration, I need to let him know he is professionally skilled and relevant, and we need him, so it is not like that. But it's still his decision; I respect it. But he shouldn't feel obliged to accept the offer. (Manager, technology)

The managers' awareness of the pressure from the company to encourage older subordinates to retire also influenced their behavior toward the HR department. To retain older employees with essential expertise, an interviewed manager said she made efforts to intervene before the HR department could proactively promote retirement:

I know what HR does and how the process works. So, I contacted HR on my initiative, although it's not part of the formal process (...). If I don't do it, HR will contact the person and say, 'Now that you approach 62, this is what we can offer ...' and talk through the benefits of resigning at 62. (Manager, technology)

Despite their awareness of the influence of corporate retirement norms on older employees' retirement decisions, most managers expressed reluctance to discuss age and retirement with their older subordinates. Although they emphasized their positive attitudes toward their older subordinates, they maintained that age-related topics, such as late-career preferences and retirement decisions, should be considered private:

I don't focus on age but what people deliver (...). No one ever feels as old as they are, and I think most people like to be taken for who they are and not for their age. You can guide and support someone falling behind on their work tasks by asking a few questions to understand their challenges and help them get back on track. (Manager, technology)

The managers exhibited reluctance to respond to inquiries regarding the influence of aging on employees. They emphasized their favorable attitudes toward their older subordinates and cited the organization's corporate diversity profile as evidence of their adherence to these values. However, some managers expressed a desire for guidelines to aid them in conducting more constructive conversations about age-related issues with their older subordinates:

Much of our age management policy is enshrined between people's ears, and I have felt as I get older that it would've been nice if there were established guidelines to handle the transition from getting older to ultimately going in for a landing. Much is done correctly, but what happens is contingent on the actions of the immediate manager. (Manager, finance)

Managers in both companies viewed their respective company's age management policies as lacking in several respects, feeling that the policies were inadequate, underdeveloped, and ineffective in practice. Although personnel handbooks contained policies for older employees, there was no established protocol to implement them. Consequently, the managers believed that the written age management policy was concealed and that a disparity existed between policy and practice. This ambiguity and confusion made it challenging for managers to implement supportive age management policies in their departments.



Employee perspective: Viewing leadership as a shield against retirement pressures

Companies function within competitive markets and frequently face redundancies, mergers, and acquisitions. Due to automation and digitization, both companies regularly undergo cutbacks and reorganizations. A participant used a symbolic reference to an 'elimination game' to describe how he perceived the corporate environment:

...almost every year, there's been some reorganization and downsizing (...). In that process, the managers define all positions needed in their department, match freely from the organizational pool, and decide who best fits. The employees don't get to choose; the company places them in the positions they are considered best suited for. It becomes a bit like a chair game, and several chairs are usually taken out each time. (Employee, technology)

Older employees were significantly impacted during staff reductions, often being offered severance pay as compensation for voluntary departures, especially among those aged 62 years and above. This led to a prevailing perception among participants that career extension was closely linked to navigating organizational changes and cutbacks. Employees said that within discussions among colleagues concerning late-career and retirement plans, the topic of receiving such packages was frequently raised:

If we discuss anything (regarding plans), we discuss the severance packages we think we'll get one day. 'When will I get the package?' we say jokingly. Because we believe that day will come. We'll be [forced] out during some reorganization. (Employee, finance)

The employees clarified that their immediate managers were not responsible for targeting cuts toward older employees. Such decisions were instead attributed to the higher echelons of the corporate hierarchy:

...I think the decision came directly from HR, if I'm not entirely wrong. The manager was not the one who wanted him removed. I hope that this practice will eventually change. If they exit people, they should decide based on competence or work effort, not age. (Employee, technology)

While the employees interviewed commonly believed that the strategy of exiting older employees during cutbacks stemmed from higher levels of corporate management, they suggested that older employees could enhance their bargaining position and survival chances by aligning themselves with influential and supportive managers: '...in a system like this, it's all about having a manager who recognizes and supports you (...). If you're unfortunate and lack that kind of manager, you'll quickly be dismissed or relocated in changes and cutbacks' (employee, technology).

Employees who had served longer than the norm within their corporation attributed their survival to their understanding of the system, high adaptability, and strategic alignment with influential managers who could offer protection. These were identified as critical factors for success. According to one employee, establishing a 'relationship of trust' with a manager was crucial for securing job stability:

...I thought, 'Which of these managers can I work with?'. And then, I went to my current manager and told him I wanted to work with him. I know him well because we've worked together before, so I got a place with him. I feel very safe and trust him 110 percent, and I know he has the same relationship of trust with me. I'll never do anything at the expense of that trust. (Employee, technology)

Another factor contributing to job security and psychological safety in a continuously changing organizational environment, as reported by the interviewed employees, was having a manager who understood and appreciated their contributions in the workplace. However, due to frequent management changes, managers were often perceived as lacking insight into everyone's tasks, roles, and contributions, leading to a notable expectation for self-management among employees. Interestingly, this situation seemed to give younger employees an advantage, as they were thought to be more proactive in showcasing their skills:

...I think younger employees, in general, are much better at marketing themselves, such as on internal Facebook and that type of thing. And then, some of us, who may not have grown up with social media, are more focused on doing the job than telling what we've done on Facebook, right? We become less visible in the organization, so if my immediate manager doesn't understand what I do, I'll hang looser in reorganizations and cutbacks. (Employee, finance)

While employees recognized the crucial role of managers' support in managing organizational downsizing, sustaining a supportive relationship between employees and managers was often found to be lacking. This was evident from employees' reported lack of complete trust in their immediate managers, indicative of a low-quality LMX relationship. None of the employees said that they had encountered direct ageist management behavior, yet some harbored reservations about the reliability of their direct managers:

I don't worry that my manager will mistreat the information; we just had a conversation... It's more that I feel unsure about how such a conversation will affect him subconsciously. At the subsequent reorganization, the next round of downsizing... what kind of influence will I be allowed to exercise on my future? In reorganizations in a company like this, when you have been employed for so long, sometimes you get the jobs you want, and sometimes you must take the jobs you are asked to take. It's a bit like a board game, and I'd like to be a player and not just a piece on that board. (Manager/employee, finance)

As the above quote highlights, older employees' mistrust of their managers was rooted in ambiguity about the manager's loyalty—whether to the company or the employees. Frequent organizational changes, leading to leadership turnover, added another layer of complexity to establishing high-quality LMX relationships:

After all, this is a large company. We get new bosses all the time, so the only thing you can be sure of is that things will be turned around. Someone at the top will have new ideas, and things will be changed. (Employee, technology)



Employees noted that freshly graduated managers were often brought in to demonstrate their aptitude for implementing changes and downsizing. However, introducing these new and less-experienced managers left older employees without a familiar leadership presence, one who understood their work history and grasped the distinct challenges they might face within the company during their late career stages. One manager, reflecting on the issue, shared insights from an employee's viewpoint: '...business school management graduates forget to see seniors as resources. Instead, they see them as someone to get rid of. That's how people experience it all around the company' (manager/employee, technology).

The impact of leadership changes on employees' assessments of their career extension opportunities was evident throughout the interviews. An employee expressed his intention to continue working until the age of 65. However, he noted that this plan would largely depend on the difficulty of 'training' a new manager once the current one left: 'I'll probably try to stay at work until 65; I'll probably try. But my boss is leaving in a year and a half and starting to train a new boss... it's impossible (laughs)' (employee, finance).

Management challenge: Preserving expertise while attracting new talent

The interviewed managers acknowledged that they were responsible for making way for younger employees and introducing new expertise into their respective companies. As part of reorganization and downsizing efforts, it was a standard measure to explore company-based early retirement options for those nearing retirement age:

There is a concern about getting unique knowledge into the company (...), and we're under constant pressure to reduce costs. Cutbacks reduce costs, and we must often look to those approaching 62 who can get a contractual pension (AFP). There's much focus on reducing costs that way. (Manager, technology)

The managers generally perceived a more significant emphasis at higher corporate levels on attracting younger and more recent graduate employees rather than investing in or retaining long-standing ones. However, some managers said they found this approach difficult to support, especially in instances where they thought the expertise of their older subordinates would not be easily replaceable:

The most significant challenge is that the company doesn't have enough respect for the existing expertise, which we need (...). When it's gone, there's a gap, and it's not like you can go out on the street and find someone to fill that gap (...). This competence has been built over several years and must be respected. That is my biggest frustration. (Manager, technology)

Managers within the finance company also expressed this concern, articulating apprehensions that veteran employees with extensive tenure were being too hastily discharged in the company's effort to pave the way for younger recruits:

I've seen competent and resourceful people disappear. The way I see it, we should have fought to keep them. They retire early... We should have been better at rewarding older people; they are essential to the company. I mean, they possess critical knowledge that, in a way, slides out the door and must be built up anew. (Manager, finance)

Managers frequently felt trapped between the organization's ambition to draw in younger talent and to preserve long-serving employees' expertise. While this may appear to be an unresolvable problem, one manager suggested that it could be navigated through careful long-term planning:

We depend entirely on bringing in many young people; fortunately, we have succeeded. I understand it can get heavy at the other end; still, we can afford to do it more humanely. As a manager, you can plan for three years and take the necessary measures over a slightly extended period to avoid these forced situations. (Manager, technology)

In the technology company, HR implemented an additional measure to address the challenge of laying off older employees during reorganizations and cutbacks. Employees aged 58 years or older, facing redundancy, were offered a 'pool' position (also referred to as a resource center by HR), allowing them to remain employed in another department of the organization until they reached the age of 62 and became eligible for retirement with a contractual pension. This initiative aimed to offset the loss of pension entitlement that 62-year-olds would experience if laid off. HR portrayed this arrangement as both a safety net and a humane approach to managing the older workforce:

Anyone told they no longer have a place within the organization after a restructuring process... it's a lousy message to receive. But we hold information meetings about the resource center and tell them what it is; many become optimistic when they understand how it works (...). We point out that in 99 percent of the cases, it is a positive experience. They feel taken care of by the company, and it allows them to try working in other divisions than the one they've always been in. (HR manager, technology)

However, some managers considered this approach morally questionable and a means of reassigning older employees rather than genuinely addressing their needs. The following quote underscores the persistent dilemma faced by managers who grappled with implementing what they perceived as the company's policy of prioritizing younger employees over older ones:

There's a human side to it, and there's no doubt that those who end up in that situation have had no other options (...). But it's also a tool the company has made to legally relocate people to create something new that I can understand. It's just that... it becomes cynical when someone sits in that position. (Previous manager/employee, technology)

The quote shows that the manager acknowledged the company's change and succession management requirements. However, the manager also expressed concerns about the adverse effects on employees who were laid off or relocated, recognizing their limited options.

Discussion

This study addressed the following research question: *How do organizational retirement age norms influence leader-member exchange (LMX) relationships during late-career employment?*



This question is vital, as numerous research studies, as highlighted in the theoretical review, suggest that high-quality LMX relationships can provide older employees with better opportunities to prolong their careers (Aggarwal et al. 2020; Brimhall et al. 2016). Prior research has demonstrated that organizational policies substantially impact managers' behavior and the dynamics of social interactions in the workplace (Biswas et al. 2021; Douglas et al. 2003). These policies are instrumental in achieving organizational goals and objectives while facilitating or impeding managers' cultivation of high-quality LMX relationships with diverse team members.

This study provides evidence that organizational retirement age norms influence leadership behaviors and the quality of LMX relationships during the later stages of employees' careers. Several internal practices were identified in the corporations under study to counter the broader political and policy objectives and encourage employees to extend their careers. These practices, which involved providing substantial benefits or enticing severance packages, exerted significant organizational pressure on employees to retire upon reaching the age of 62. This retirement age is a decade earlier than politically desired, underscoring a considerable discrepancy between organizational retirement norms and policy objectives.

Mulders et al. (2017) highlighted the significant role of top managers in shaping organizational practices, underscoring the importance of leadership in the development and impact of norms. Age-related workplace norms also play a crucial role in shaping organizational practices at a broader level, suggesting that the age-related workplace norms of top managers trickle down through the organization, ultimately impacting organizational behavior.

In this study, the influence of top management retirement age norms on the LMX relationship was evident in the support that older employees deemed necessary from their managers, and the support managers believed they could offer their older employees. The newly established concept of serving as an 'umbrella carrier', referenced in the theory section, implies a protective and buffering role that middle managers can assume, safeguarding their subordinates from organizational pressures or decisions that could harm them (Gjerde & Alvesson 2019). This concept seems relevant to leading older employees in corporate environments, where retirement pressures from HR policies and top management intensify as employees approach the end of their careers.

As the current study highlights, immediate managers can serve as 'umbrella carriers' for older subordinates, protecting them from these retirement pressures. In doing so, they can enable older employees to maintain control over their career paths in their late careers, potentially prolonging their careers beyond the expectations set by organizational norms. In the absence of managers assuming the role of 'umbrella carriers', however, older subordinates can feel disempowered and passive in shaping their late-career trajectories. This could make them susceptible to adverse outcomes, such as facing layoffs during downsizing or experiencing demotion or loss of significant roles. As one informant aptly said, 'I want to be a player, not just a piece on the board'.

Moreover, managers can serve as 'umbrella carriers', providing a protective shield for employees against lateral pressures (Gjerde & Alvesson 2019). This study identified younger colleagues with a strong propensity for self-promotion as a source of such lateral pressure, from which managers could potentially safeguard their older subordinates. This aligns with the observed tendency among the interviewed employees to view themselves as less prone to self-promotion than their younger peers. Research has

suggested that older employees who challenge stereotypes and engage in self-promotion may face adverse career consequences (Krings et al. 2023), prompting them to distance themselves from such behavior. However, self-promoting can be crucial in demonstrating one's value to the organization, especially in dynamic environments characterized by frequent leadership transitions and fluid structures.

As a result, older employees were found to prefer managers who interacted closely with them, had insights into their professional roles, and recognized their value to the organization. Through this level of engagement, managers could help prevent older employees from being unjustly disadvantaged when competing with younger colleagues. For older employees, sustaining their relevance within the organization frequently hinged on associating themselves with 'the right manager'.

However, frequent leadership changes emerged as a significant obstacle to forming high-quality LMX relationships. Developing LMX relationships entails different stages (Graen & Scandura 1987). In the role-taking stage, leaders assess the potential and motivation of new members, and both parties form initial impressions. The role-making stage involves delegating tasks and establishing mutual trust between leaders and members. Finally, in the role routinization stage, leaders and members share a sense of obligation and a history of collaboration, resulting in a predictable and emotionally charged relationship. This stage fosters mutually beneficial role behaviors, high-performance expectations, and a shared understanding of organizational norms and goals (Goldberg & McKay 2016; Graen & Scandura 1987). In contrast, during the early stages of the LMX relationship, the leader's evaluations of the member can be significantly influenced by factors such as perceived similarity and stereotypes, overshadowing the member's actual behavior (Davis & Gardner 2004; Graen & Scandura 1987). Consequently, the continuous turnover of managers in the workplaces under study, compounded by the arrival of newcomers unfamiliar with the work history of existing employees, had a detrimental effect on trust in leadership, discouraging older employees from openly discussing the challenges they encountered.

On the managerial front, supporting older employees in the later stages of their careers was found to present intricate dilemmas. Managers had to balance older employees' well-being and career aspirations with organizational imperatives such as workforce planning, succession management, and productivity maintenance. Achieving these objectives involved recruiting and nurturing younger talent to ensure the organization's long-term viability. However, striking a balance between these competing priorities could be challenging. While employees may have wanted to prolong their professional careers, organizational strategies often focused on transitioning them out of roles to accommodate younger staff or adapt to evolving business demands.

Some leaders advocated standardized organizational guidelines to manage older employees and address associated challenges. Without such guidelines, managerial decisions were made at the discretion of individuals, leading to varying levels of awareness or protection among managers regarding directives advocating for the transition of older employees out of the organization.

Wainwright et al. (2019) underscored the risks posed by ad hoc organizational policies enacted by individual managers. These policies, whether aimed at phasing out underperforming employees or retaining those considering early retirement, raise significant concerns regarding fairness and equity in employment.

The findings of the current study echo these concerns. The interviews revealed instances in which certain managers departed from established human resources



practices by encouraging older employees to extend their careers instead of facilitating their transition through transfers or retirements. However, this approach was not universally understood or endorsed by managers.

Inconsistent managerial behavior may inadvertently foster an unequal playing field within organizations. Employees with solid supervisor support and specialized skills considered difficult to replace by newcomers may have better opportunities for career prolongation. In contrast, those lacking support or specialized skills may face disadvantages, including increased vulnerability to negative job changes or termination. While individual high-quality LMX relationships can offer valuable encouragement and support to employees, they can also cause significant disparities in how employees are treated. This can render workplace inclusion more arbitrary and leave older employees in precarious positions.

Conclusion

This study underscores the significance of a high-quality LMX relationship, defined by mutual trust, respect, and reciprocal obligation (Graen & Uhl-Bien 1995; Nishii & Mayer 2009), in buffering against retirement-related organizational pressures. Such relationships function as a protective shield on both emotional and practical fronts, offering emotional support and validation while also thwarting potentially detrimental HR initiatives that could influence employees' decisions to depart.

However, the need for such shielding underscores the challenges that older employees may face in the workplace. While high-quality LMX relationships can provide a protective shield, broader organizational changes are necessary to prevent companies from adopting practices that establish retirement age norms inconsistent with the policy goal of extending people's working lives.

In conclusion, while individual managers' influence on shaping older employees' work experiences is undeniable, broader policy changes are crucial. Government initiatives to extend careers may fall short if private companies lack incentives to support late-career employment and have no regulations curbing practices promoting early retirement. The burden may also disproportionately fall on individual employees to navigate leader-member dynamics that shield them from such pressures.

Implementing stricter regulations could deter actions that push older employees into premature retirement, such as offering substantial benefits or enticing severance packages based on age. Such changes can foster a more supportive and inclusive work environment that recognizes and values the continued contributions of older employees.

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