Retrenchment and Labour Market Disadvantage: The Role of Age, Job Tenure and Casual Employment

David Peetz Griffith University

Abstract

Industrial tribunals are considering redundancy benefits for older workers, workers with long job tenure and casual workers (the latter group presently having no access to redundancy benefits regardless of tenure). This paper details labour market disadvantage faced by these categories of retrenched workers.

This paper considers the relationships of age, tenure and employment status to disadvantage in the labour market, particularly for of workers who have been retrenched. There are significant policy implications to this issue, as evidenced by current cases before the Oueensland and Industrial Relations Australian Commissions. The main focus is on data from the Australian Bureau of Statistics (ABS). One source is the Labour Force A number of supplementary surveys associated with the Labour Force survey are also used. The most important of these is the Retrenchment and Redundancy survev. from which unpublished data have been obtained. This supplementary survey was undertaken by the ABS in July 1997 and July 2001. The supplementary survevs undertaken in different labour market contexts, with the national unemployment rate lower in July 2001 (6.9 per cent, seasonally adjusted) than in July 1997 (8.3 per cent). As a consequence of the better labour market situations, the estimated number of retrenched employees was lower over the three years to June 2001 (596,400) than over the three years to June In a labour market 1997 (685,400). characterised by lower unemployment, the labour market outcomes for retrenched employees were also more favourable over the later period, with 16.6 per cent of employees who had been retrenched in the three years to June 2001 still unemployed in July 2001, whereas the comparable figure for July 1997 was 29.3 per cent. As

a consequence, unemployment duration amongst retrenched employees also declined. However, in July 2001, 16.2 per cent of employees who had been retrenched in the preceding three years were now 'not in the labour force', compared to 16.0 per cent in July 1997.

In interpreting changes between the 1997 and 2001 data, it is important to bear in mind that both sets of data are based on surveys that are subject to sampling error. Because of the lower rates of redundancy and unemployment in the later period, estimates of proportions reported in most of the tables for 2001 tend to have higher standard errors and lower reliability than comparable estimates for 1997.

Age

Before turning to the specifics of the retrenchment and redundancy surveys, we first consider general data on age from the labour force survey and elsewhere. There is considerable evidence of a higher level of disadvantage faced by older people in the labour market. For example 'a Morgan and Banks survey (December 1997) indicated that Australian companies were adopting an attitude that the ideal age of employees is between 25 and 35 years, almost a third of bosses believing the over 40's to be less flexible in their work practices' (Walley, Steinberg & Waller 1999:10).

We focus initially on unemployment duration as a key indicator of labour market disadvantage. Table 1 considers data on unemployment duration by age from the labour force survey. In June quarter 1997 (and in July 1997) around two thirds of over 55 year old unemployed persons were experiencing high duration unemployment, compared to no more than one half of the under 55 year olds. In 2001 the proportion of high duration unemployed in both groups fell, but the fall was proportionately smaller for the 55+ age group (the fall of 9 percentage points represented a drop of 14 per cent for the 55+ age group, compared to 24 per cent for the under 55 year olds). consequence, whereas in June quarter 1997 a 55+ year old unemployed person was 1.5

times as likely to be experiencing long duration unemployment as an under 55 year old, by June guarter 2001 the relative disadvantage faced by long duration unemployed had increased, so that they had become 1.7 times as likely to be experiencing long duration unemployment. Since then there has been a small improvement in the labour market, with unemployment falling from 6.8 per cent in June guarter 2001 to 6.4 per cent in June quarter 2002. However, the absolute incidence of high duration unemployment amongst the over 55 year olds remained unchanged and their relative position deteriorated slightly further.

Table 1: Proportion of Unemployed Persons with High Duration Unemployment and Incidence of High Duration Unemployment, by Age, June Quarters, 1997, 2001 and 2002

	1997	2001	2002
Proportion of unemployed persons with high duration unemployment			
aged 55 and over	67%	57%	57%
aged 54 and under	44%	34%	33%
Incidence of high duration unemployment – ratio of aged 55+ to 54 and under	1.5	1.7	1.8

Source: ABS, Labour Force, Australia, Cat No 6203.0, various months.

Population: Unemployed persons

Retrenchment and Redundancy

Patterns of disadvantage generally facing older employees in the labour market are reflected in the experience of older retrenched employees. There is near 'unanimous' agreement in the literature that 'age is negatively related to the likelihood and speed of re-employment' of retrenched workers (Wooden, 1988:6). Despite the existence of laws prohibiting against discrimination on the grounds of age, employers are reluctant to take on older employees (VandenHeuvel, 1999; O'Brien, 2000; Athanasou, Pithers & Petoumenos, 1995). Once unemployed, 'mature workers often find it extremely difficult to regain work, for a range of reasons; from employers attitudes of who and what is an older worker, to a lack of

qualifications or skills...Older people are more likely to be unemployed for 12 months or more than vounger people...Younger people tend experience short bursts of employment followed by periods of unemployment, whereas workers over 45 who become unemployed have difficulty finding any employment.' (Walley, Steinberg & Waller 1999:8,9) Older workers are more likely to have difficulty in finding reemployment once retrenched. example, in 1997, 65 per cent of an unemployed persons aged 55 and over had been unemployed for 26 weeks or more, compared to 37 per cent of unemployed 24 to 34 year olds.

Of course, unemployment duration does not indicate the full extent of labour market disadvantage faced by various groups in the labour market. Some people may leave the labour force altogether - for example, they may eventually give up looking for work if, after a period of job search, they are unable to find suitable employment (VandenHeuvel, 1999:16). The ABS supplementary survey on successful and unsuccessful job search experience reveals that jobseekers in older age groups were least likely to be successful in finding a job (ABS Cat No 6245.0, July 2000, p5). Data on labour force exit incorporate the effect of discouraged job seekers - people who would like a job but who no longer satisfy the ABS definition of unemployment – and people who have given up hopes of employment altogether. Discouraged job seeking is a particular problem amongst mature age people. For example, 'discouraged job seekers make up a considerably larger percentage of the population of older male workers (55 years and over) than of younger makes. For women, the differences by age are even larger' (VandenHeuvel 1999:16-17; see also Walley, Steinberg & Waller 1999: 9).

The data from the redundancy and retrenchment survey did not include specific counts of discouraged job seekers. However, a related, useful indicator of need amongst retrenched employees from this survey is the proportion who are not in work – they are either unemployed or not in the labour force. Table 2, from the retrenchment and redundancy survey, shows that older retrenched persons, particularly those aged 55 and over, had a higher probability of being unemployed or not in the labour force than their younger counterparts.

Table 2: Percentage Unemployed or Not in the Labour Force, by Age and Permanent or Casual Status of Previous Job

Duration in Job from which Retrenched or Made Redundant	Proportion Unemployed or not in the Labour Force, July 1997, by Age Group			rce, July		
	18-24 (%)	25-34 (%)	35-44 (%)	45-54 (%)	55-64 (%)	All (%)
1997						
permanent	40.9	34.8	33.4	39.3	67.7	40.4
casual	62.3	53.2	53.9	55.6	66.1	57.3
all employees	51.4	40.7	38.1	42.4	67.4	45.3
2001						
permanent	30.8	26.9	25.4	28.5	51.1	30.2
casual	49.6	34.6	30.8	43.6	47.3*	40.8
all employees	39.7	28.9	26.5	31.7	50.8	32.8

Source: ABS Cat No 6266.0, unpublished data.

Population: Persons aged 18 to 64 years who had been retrenched or made redundant in the three years to 30 June 1997/2001.

Prior Job Tenure

A key factor in understanding the relationship between prior job tenure and labour market outcomes is age. (The term 'prior job' is used as short hand in this text

for 'job from which the employee was retrenched or made redundant'.) The ABS data indicate that older workers (especially those aged over 55) are more likely to have been in long duration jobs. We would

expect that retrenched employees with longer prior job tenure would be relatively disadvantaged as a consequence of their age. Retrenched employees with long term tenure in their previous job are also disadvantaged because their skills and experience have been specific to a particular employer and they may not be readily transferable (Wooden, 1988:7). We turn, now, to various indicators of disadvantage amongst different groups of retrenched workers.

Unemployed or Not in the Labour Force
Table 3 shows the proportion of employees
unemployed or not in the labour force

amongst retrenched employees who were formerly in 'permanent' jobs, differentiated by tenure of prior job. As can be seen, the greatest disadvantage in 1997 experienced by those with very short prior job tenure, and those with long prior While the situation improved for tenure. all groups between 1997 and 2001, the improvement was smallest for those with greater than 5 years job tenure (4 points, compared percentage percentage points for the 1 and under 5 years group, and 21 percentage points for the under 12 months group).

Table 3: Proportion Unemployed or Not in the Labour Force, July 1997, by Duration of Job From Which Retrenched or Made Redundant, Retrenched Persons Formerly in Permanent Employment

	Proportion Unemployed or Not in the Labour Force		
Duration in Job from which Retrenched or Made Redundant	July 1997 (%)	July 2001 (%)	
Under 12 months	49.1	28.0	
1 and under 5 years	34.3	24.9	
5 years and over	39.4	35.2	
Total	40.4	30.2	

Source: ABS Cat No 6266.0, unpublished data.

Population: Persons aged 18 to 64 years who had been retrenched or made redundant from permanent jobs in the three years to 30 June 1997/2001 and were unemployed in July 1997/2001.

Changing from Full-Time to Part-Time Status

There is evidence to suggest 'retrenchment can be the catalyst to different, less secure forms of workforce attachment; that is, it can mark an individual's of point transition "casualised" employment' (Webber and The literature also Webber 1999:110). 'almost universally', that employment, where it does occur, is frequently in less well paid jobs than those from which employees were retrenched (Wooden 1988:18). Another indicator of disadvantage amongst retrenched employees, then, is whether they have been able to resist reductions in their hours of work, from full-time to part-time. As shown in Table 4, retrenched employees with long prior job tenure are more likely than other retrenched employees to shift from full-time to part-time employment.

Table 4: Proportion of Permanent Employees Who Changed from Full-Time to Part-Time Status, by Duration in Job from Which Retrenched or Made Redundant

Duration in Job from which Retrenched or Made Redundant	Proportion of permanent employees who changed from full-time to part-time status		
	(%)		
	1997	2001	
under 12 months	11.0	12.5	
1 and under 5 years	13.5	12.0	
5 years & over	19.4	17.4	
All	14.9	14.3	

Source: ABS Cat No 6266.0, unpublished data.

Population: Persons aged 18 to 64 years who had been retrenched or made redundant in the three years to 30 June 1997/2001 and who were employed in July 1997/2001.

Unemployment Duration

Table 5 shows unemployment duration of people who had been retrenched from a 'permanent' job in the previous three years and who were still unemployed. Some 51 per cent of retrenched employees with prior

job tenure of five years or more had been unemployed for 26 weeks or more at the time of the ABS survey. Within this tenure group, disadvantage increased with tenure: amongst retrenched employees with prior job tenure of ten years or more, the figure was 59 per cent.

Table 5: Unemployment Duration, by Previous Job Tenure, Retrenched Persons Previously in Permanent Jobs

Duration of Current Period of Unemployment	Duration in Job from Which Retrenched or Made Redundant			
Chemployment	in Job for Under 12 Months (%)	in Job for 1 and Under 5 Years (%)	in Job for 5 Years and Over (%)	
1997				
Under 8 weeks	28.4	26.2	21.2	
8 and under 26 weeks	24.0	32.8	27.3	
26 weeks and over	47.8	41.0	50.8	
All	100.0	100.0	100.0	
2001				
Under 8 weeks	42.2	45.2	43.1	
8 and under 26 weeks	39.8	28.2	31.0	
26 weeks and over	18.1*	26.6	25.9	
All	100.0	100.0	100.0	

Note: Numbers in columns may not add to 100.0% due to rounding.

Population: Persons aged 18 to 64 years who had been retrenched or made redundant from permanent jobs in the three years to 30 June 1997/2001 and were unemployed in July 1997/2001.

Source: ABS Cat No 6266.0, unpublished data.

Whereas in 1997 the proportion of retrenched people who suffer high duration

unemployment was highest amongst those with prior job tenure of under 1 year and

Asterisked proportions based on estimates with a standard error of greater than 25 per cent.

over 5 years, in 2001 the highest rates of unemployment high duration experienced amongst those with prior job tenure of 1 to 5 years and over 5 years. On the surface this would appear to signify an improvement in the relative position of retrenched permanent employees with long prior job tenure in 2001, compared to 1997, to the point where they were in a similar position to retrenched employees with 1 to 5 years tenure. However, in relation to indicators such as the proportion retrenched employees who unemployed or not in the labour force (Table 5) and switching from full-time to part-time employment (Table 6), relative disadvantage faced by employees with long prior job tenure persisted. In addition, age, which continued to be strongly correlated to prior job duration (Table 4), was still also correlated with the proportion of unemployed or not in the labour force (Table 3). Before seeking to understand this seeming paradox, we shall turn to evidence from another indicator of disadvantage, 'joblessness duration'.

'Joblessness Duration'

While data on duration of current unemployment spells were collected by the ABS, directly analogous data for periods of being 'not in the labour force' were not collected. However, for all those people who are no longer currently employed (ie they are either unemployed or not in the labour force) we can calculate in grouped format the period of time since a retrenched employee lost their job (based on in what year the employee was retrenched). This is referred to here in shorthand as 'joblessness duration', though this is not quite accurate because it fails to take account of intervening periods of temporary employment that some employees may have experienced. usefulness is not so much in estimating joblessness duration but in seeing whether similar relationships exist with tenure as are found in relation to unemployment

duration – that is, it provides a reality check on the unemployment duration data.

Table 6 indicates that what we call 'joblessness duration', like unemployment duration, shows a marked bias towards retrenched employees from jobs with long That is, it confirms the prior tenure. faced disadvantage by employees retrenched from jobs with high prior Between 1997 and 2001 the incidence of high joblessness duration (ie of greater than 26 weeks) fell for all groups of permanent employees, but if anything the falls appeared to be weakest for those with prior job tenure of over 5 years (3.5 percentage points, compared to around 6 percentage points for the other two groups).

Unemployment Duration Revisited

There appear to be three possible explanations for the pattern whereby declining estimated unemployment duration amongst employees with long prior job tenure seems to sit alongside the persistence other indicators of disadvantage amongst this group. might be that that there has been a significant increase in voluntary early retirement amongst older people, and this is affecting older retrenched persons as it is affecting older workers more generally. We can dismiss this explanation fairly quickly. Labour force participation rates increased in all three older age groups (45-54, 55-59 and 60-64 year olds) between 1997 and 2001. If these data are indicating anything about retirement patterns, it is that people were retiring later, not earlier, in 2001. Trends of increasing participation rates amongst older workers continued through to 2002. Moreover, if retrenched employees were 'retiring' at the times they do through genuine choice, we would expect the distribution of retirement ages amongst retrenchees to be similar to the distribution amongst people who choose their retirement date. The ABS Retirement and Retirement Intentions Survey indicates that, amongst persons who retired after reaching the age of 45 years, 68 per cent of those who lost their last job due to retrenchment 'retired' before reaching age 60 years, compared to: 45 per cent of all 'job leavers'; and 56 per cent of those who left their last job for reasons associated with early retirement (early retirement package, eligible for superannuation or service pension).

Table 6: 'Joblessness' Duration, by Employment Status and Prior Job Tenure

Period of time since retrenched	retrenched Duration in job from which retrenched or made red		
	in job for under 12 months (%)	in job for 1 and under 5 years (%)	in job for 5 years and over (%)
1997			
Permanent employees			
• under 26 weeks	44.5	44.3	26.0
• 26 weeks and over	55.5	55.7	74.0
• Total	100.0	100.0	100.0
Casual employees			
• under 26 weeks	42.7	34.9	24.2*
• 26 weeks and over	57.3	65.1	75.8*
• Total	100.0	100.0	100.0
2001			
Permanent employees			
• under 26 weeks	50.2	50.5	29.5
• 26 weeks and over	49.8	49.5	70.5
• Total	100.0	100.0	100.0
Casual employees			•
• under 26 weeks	48.3	46.7	25.0*
• 26 weeks and over	51.7	53.3	75.0*
• Total	100.0	100.0	100.0

Note: Numbers in columns may not add to 100.0% due to rounding. 'Joblessness duration' as recorded here includes both: people who have been jobless for the entire period from when they were retrenched, up until the survey date; and people who have had jobs between being retrenched and the survey date but who were jobless at the time of the survey.

* Asterisked proportions based on estimates with a standard error of greater than 25 per cent. Population: Persons aged 18 to 64 years who had been retrenched or made redundant in the three years to 30 June 1997/2001 and who were not employed in July 1997/2001.

Source: ABS Cat No 6266.0, unpublished data.

Two remaining explanations are more plausible. One is that an increasing proportion of retrenched people in older age groups and with longer prior job tenure who are unsuccessful in finding new jobs are leaving the labour market altogether, and this has disproportionately lowered average unemployment duration amongst those with long prior job tenure (the

'discouraged worker effect'). The other is that the apparent change reflects sampling variation between surveys (the 'sampling effect'). In this context, it is worth noting that the 10.4 percentage point shift in relativities between the 1-5 year and 5+ years tenure groups was not statistically significant. Given the greater reliability of the labor force survey data as a whole the

(bleaker) trends shown in the comparison of the labour force surveys are much more likely to be true reflections of reality than a comparison of the retrenchment and redundancy supplementary surveys.

Casual/Permanent Employment Status

Do retrenched casual employees experience lesser labour market disadvantage than retrenched permanent employees of similar prior job duration?

Casuals are defined as employees without access to annual leave or sick leave. Whereas young people (aged 18-24) made up 39 per cent of retrenched casuals with less than 12 months of service with the previous employer, young people accounted for only 19 per cent of retrenched 'long term' casuals (ie those with 12 months or more service in their previous job).

Table 7: Percentage Unemployed or Not in the Labour Force, by Permanent or Casual Status of Previous Job, Retrenched Persons with Prior Job Tenure of 12 Months and Over

Employment Status	Proportion Unemployed	Proportion Not in the Labour Force	Proportion Unemployed or Not in the Labour Force
	(%)	(%)	(%)
1997			
Permanent employees with 12 months or more prior job tenure	18.6	18.6	37.2
Casual employees with 12 months or more prior job tenure	27.7	23.5	51.1
All employees	20.0	19.4	39.4
2001			
Permanent employees with 12 months or more prior job tenure	13.7	16.9	30.7
Casual employees with 12 months or more prior job tenure	16.5	21.2	37.7
All employees	14.2	17.6	31.8

Source: ABS Cat No 6266.0, unpublished data.

Population: Persons aged 18 to 64 years who had been retrenched or made redundant in the three years to 30 June 1997/2001 from jobs with tenure of 12 months or more.

Table 7 considers the differences between retrenched 'long term' casual employees and permanent employees with similar prior tenure in relation to their status as being unemployed or not in the labour force. The greater disadvantage experienced by retrenched long term casuals is apparent. Some 51 per cent of long term casuals who had been retrenched were still unemployed or out of the labour force in July 1997, compared to 37 per cent of permanent employees with similar

job duration. In 2001, 38 per cent of long term casuals who had been retrenched were still unemployed or out of the labour force in July 1997, compared to 31 per cent of permanent employees with similar job duration, though the difference was not as great as in 1997. As can also be seen in table casuals 2, retrenched disadvantaged relative to retrenched permanent employees in all age groups except the over 55 age group, in which the

experiences of casuals and permanents are almost equally poor.

When measured by unemployment duration, retrenched long term casuals are more disadvantaged than are equivalent retrenched 'permanent' employees (table 6). In 2001, while 26 per cent of unemployed persons in the latter group had

unemployment duration of at least 26 weeks, the same was the case for 41 per cent of the former group. Table 8, shown earlier, also confirms that in terms of 'joblessness duration' the position of retrenched long term casuals is at least as bad, and probably worse, than that of retrenched permanent employees with similar prior job duration.

Table 8: Unemployment Duration, by Permanent or Casual Status, Retrenched Persons Employed for 12 Months and Over Job Duration.

	Distribution of Unemployment Duration				
Duration of Current Period of	(%)				
Unemployment	Permanent Employees with 12 Months or More Prior Job Tenure	Casual Employees with 12 Months or More Prior Job Tenure			
1997					
Under 8 weeks	24.2	25.0*			
8 and under 26 weeks	30.7	18.5*			
26 weeks and over	44.8	56.5			
Total	100.0	100.0			
2001					
Under 8 weeks	44.2	41.3*			
8 and under 26 weeks	29.5	16.3*			
26 weeks and over	26.3	41.3*			
Total	100.0	100.0			

Note: Numbers in columns may not add to 100.0% due to rounding.

Population: Persons aged 18 to 64 years who had been retrenched or made redundant in the three years to 30 June 1997/2001 from jobs with tenure of 12 months or more.

Source: ABS Cat No 6266.0, unpublished data.

Award Coverage and Union/Non-Union Status

While some long-tenured employees may voluntarily choose redundancy because they are close to retirement and would prefer to retire early anyway, or would prefer to use redundancy benefits to start a small business, this mainly occurs in relation to employees where unions are able to negotiate voluntary redundancy frameworks in the context of enterprise bargaining arrangements. For those employees reliant on award protection, voluntary redundancy is less common, and long-tenured employees who

retrenchment normally do not have a say in whether or not they are made redundant. In unionised workplaces, unions are often able to force voluntary redundancy programs on management, whereas in nonunion workplaces this form of downsizing relatively rare and compulsory retrenchments are more common. 1995 Australian Workplace Industrial Relations Survey (AWIRS95 -Morehead et al 1997) revealed that downsizing occurred in more unionised workplaces (29 per cent) than nonunionised workplaces (24 per cent), because large workplaces are more likely

^{*} Asterisked proportions based on estimates with a standard error of greater than 25 per cent.

to be unionised. But compulsory retrenchments were more common in nonunion workplaces (14 per cent) than unionised workplaces (9 per cent). contrast, unionised workplaces were much more likely to experience voluntary redundancies (12 per cent) than were nonunion workplaces (3 per cent). Natural attrition, redeployment and retirement were also disproportionately more likely in unionised than non-union workplaces (Morehead et al 1997:419, and unpublished AWIRS data). Similarly, in Britain workforce reductions 'were no more common in non-union than in union workplaces, but were much more likely to be achieved by compulsory redundancies' (Sisson 1993:206). In addition, between 1989-90 and 1995-96, the incidence of compulsory retrenchments rose slightly in unionised workplaces (from 8 per cent to 9 per cent) whereas the of voluntary redundancies incidence increased substantially (from 5 per cent to 12 per cent). By contrast, in non-union workplaces, voluntary redundancies fell (from 4 per cent to 3 per cent) while compulsory retrenchments rose noticeably (from 11 per cent to 14 per cent) (Morehead et al 1997).

Conclusions

Older retrenched persons and those with long prior job tenure face higher labour market disadvantage than younger ones and those with shorter tenure. Those with long prior job tenure face a lower probability of finding future employment than other retrenched employees, though those with very short tenure face different difficulties in the labour market. with long tenure also face a higher probability of being forced to shift from full-time to part-time employment if they do manage to find future employment. The most important reason for this is age. Older retrenched workers are clearly disadvantaged in the labour market.

The position of retrenched long term casuals is at least as difficult as that facing retrenched permanent employees with similar job tenure and in most respects is more difficult. They face longer periods of unemployment than equivalent permanent employees, and lower probabilities of finding work.

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