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—生命歷程體制的觀點

Pathways and Patterns of Early Retirement Regime in Germany (1970-2005)

—The Perspective of Life Course Regime

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摘要

目前福利國家研究缺乏鉅觀層次變遷對微觀層次影響的觀察。本文研究德國退出勞動市場體系的制度變遷和從工作轉變到退休的集體性行為之間的關係，瞭解制度變遷所帶來的效應和制度與個人生命歷程之間的關係。德國退出勞動市場制度或是年金體系的調整，可以說是建立在二階段的危機回應與政策模式下。受到制度本身的限制，社會保險體系成為回應經濟危機的緩衝器，以其作為減少勞動力供給的手段，此一負向勞工供給方式使得德國陷入「只有福利沒有工作」的制輪效果。此促使德國政府以此作為改革年金的正當性工具和論述，從1992年開始進行一連串年金體系的改革，而於2001年改革形成典範轉移。德國退出勞動市場體制最大的特色即是其多元化的退出勞動市場路徑。此一特色造成「工具性替代」，使其無法順利地關閉特定的提早退出勞動市場路徑來提昇老年就業率；並且使年齡規範會形成多峰型態。德國多元化的退出勞動市場路徑，使生命歷程工作與退休階段之間不再有著明確的紀年化界線，但是退出勞動市場的轉型卻是被國家退出勞動市場政策所形塑。

關鍵字：德國、退出勞動市場、生命歷程、福利體制、生產體制

Abstract

Existing welfare state studies lack a lens to observe how macro-level changes affect micro-level behaviors. This study attempts to understand the relationship between institutional change and life course by investigating early retirement regimes and the transition between work and retirement in Germany. Germany's reforms of the early retirement regime and pension system could be seen as policy patterns of second-order crisis management. As a result of institutional constraints, social insurance was used to cope with economic crises through negative labor supply. This caused Germany to become trapped in "welfare without work" and became the reason for the introduction of pension reforms since 1992. The 2001 pension reform resulted in a paradigm shift in the pension system in Germany. The main feature of the German early retirement regime is its multiple pathways. Instrument substitution made it difficult to reform the early retirement regime. In addition, the age norms for exiting from the labor market were many. The multiple pathways of exiting from the labor market resulted in the blurisation of chronologization of the transition from work to retirement, but the transition from work to retirement was shaped by early retirement policies in Germany.

Key Words: Germany, early retirement, life course, welfare regime and production regime