

## 3. Supporting Older Workers

### in the Workplace

The EQUAL program is financed by the European Union and the Hungarian, Irish, German, Spanish and Polish National Governments.



**A Booklet from the Equal InterFair Transnational Partnership  
2005-2007**

**Members of the Interfair Partnership**

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<b>FAIR plus DE-XB4-76051-20-BY/201 Nuremberg</b>	
<b>'South of Madrid' Project ES-318 Madrid</b>	
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## INTRODUCTION

### The InterFAIR Network

All five of the partners in the InterFAIR Network are territorial projects operating in specific regions of the EU and aiming to combat labour market discrimination and promote labour market inclusion at regional and local level. They are Equal at Work from Dublin; Ireland, FAIR plus from Nuremberg, Germany; South of Madrid, from Madrid, Spain; Welcoming Budapest from Budapest, Hungary and Equal Chances for All, Olstyn, Warminsko-Mazurski in Poland.

All five involve the local authority or municipality of their region as a key partner in the project, along with local employment services, public and private companies and NGOs. All of the DPs (Development Partnerships) include organisations with specialist labour market experience and organisations on the front-line of dealing with issues of labour market inclusion.

Equality and diversity challenges are at the heart of the work of the partnership. Many of the underlying challenges being faced by the DPs are common, e.g. challenges such as managing diversity in large and small organisations, enabling HR system changes to promote greater access to the labour market for disadvantaged groups, supporting companies and other organisations in adjusting to change, promoting the integration of people at risk of exclusion, promoting life-long learning for workers in low-skill jobs and promoting the integration of and full equality for older workers.

The InterFAIR Network believes that the international exchange of information, good practice and the development of transnational networking (between institutions, funders, enterprises, practitioners) can encourage creativity and enable the identification of new methods and tools.

#### *Transnational activity of InterFair*

Six conferences took place from 2005 to 2007, transnational trips were organised to link with local DP seminars. Each was built around the partnership themes and involved a wide range of participants from the DPs, specialists working in the specific thematic fields and policy makers. The conferences provided a forum for transnational debate and dissemination, as well as for networking. In addition to the trips where the five DPs come together, there were bilateral exchange visits by the partners.

- November 2005 – Dublin
- May 2006 – Budapest
- September 2006 – Olstyn
- November 2006 – Madrid

- April 2007 – Nuremburg
- November 2007 – Dublin

### *Special Interest Groups*

There were four Special Interests Groups (SIGS) set up in the partnership. These allowed the transnational working of specialists looking at solutions to common problems/challenges. In the case of the Older Workers' SIG these led to the exchange of information and the production of this booklet. Fundamental to the drive to produce this booklet was the shared belief that older workers in the workplace is a fundamental issue of equality and one which requires more attention as we face the growth of an ageing population in the EU.

## 1. DATA ON OLDER WORKERS

### Demographic Change and Older Workers in the EU

Table 1: Forecast Demographic Change in the EU, 2005 to 2030

	2005 - 2010	2010 - 2030
Total Population	+1.2%	+1.1%
Children 0-14	-3.2%	-8.9%
People aged 15-24	-4.3%	-12.3%
People aged 25-39	-4.1%	-16.0%
People aged 40-54	+4.2%	-10.0%
People aged 55-64	+9.6%	+15.5%
People aged 65-79	+3.4%	+37.4%
People aged 80+	+17.1%	+57.1%

Source: Communication from the Commission: Green Paper "Confronting demographic Change: a new solidarity between the generations" (2005) <sup>1</sup>

The overall population across EU member states is rising slowly. This rise is divided between sharp falls in the population aged under 39 and strong growth in the numbers aged over 55. These changes are forecast to be particularly marked in the 2010-2030 period.

### Overall Employment Rates in the EU and in InterFAIR Countries

The overall employment rate (for workers aged 15-64 years) <sup>2</sup> across the 25 states of the European Union increased from 61.2% in 1998 to 64.7% in 2006 <sup>3</sup>. Apart from Poland, rates of employment have increased, for the same period (1998-2006), across InterFAIR countries:

- The employment rate in Spain increased from 51.3% in 1998 to 64.8% in 2006,
- The employment rate in Ireland increased from 60.6% to 68.6% (a period of exceptional economic growth).
- The employment rate in Hungary increased from 53.7% to 57.3%.
- The employment rate in Poland decreased from 59% to 54.5% (having reached a low of 51.2% in 2003).

<sup>1</sup> European Commission (2005), COM (2005) 94 final: Communication from the Commission: Green Paper "Confronting demographic change: a new solidarity between the generations, Brussels: Commission of the European Communities.

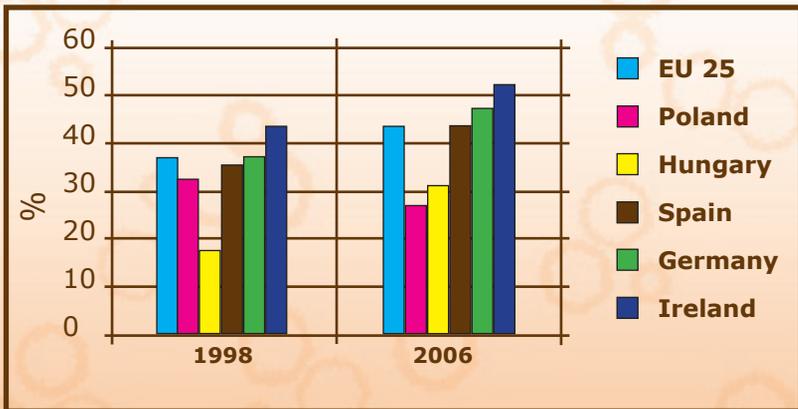
<sup>2</sup> The employment rate is calculated by dividing the number of persons aged 15-64 in employment by the total number of persons by the same age group. This indicator is based on the European Labour Force Survey.

<sup>3</sup> The figure for the EU 27 was 64.3%.

## Employment Rates in the EU and in InterFAIR Countries for People aged 55-64 ('Older Workers')

In response to growing labour market demands pushed forward by demographic change, older people are regarded as an under utilised workforce. In 2004, the OECD reported that less than 60% of the population aged 50-64 were employed, in comparison to 75% of those aged 24-49<sup>4</sup>. Due to the effects of a new demographic reality, policy makers are aware that failing to encourage and facilitate older people's participation in the work force will have a direct impact on the labour force and on the nature of the economy.

Figure 1 displays the employment rate for people aged 55-64 years.<sup>5</sup>



Source: Eurostat. The 2006 figure for the EU 25 is provisional.

In terms of their absolute numbers, Figure 1 shows that, of the five InterFAIR countries, Ireland has the highest rate of labour force participation for the 55-64 age cohort, followed by two countries –Germany and Spain– at around the EU average level. The rate of participation in Poland is considerably lower than the EU average while Hungary has shown a marked increase in employment rates for older workers.

In terms of the trends evident:

- The employment rate for older workers has expanded across the 25 EU Member States from 35.8% to 43.6%;
- The employment rate for older workers in Poland declined from 32.1% to 28.1%;

<sup>4</sup> OECD, (2006) Age and Employment Policies 'Live Longer, Work Longer', DELSA Newsletter, Issue 2.

<sup>5</sup> The employment rate is the number of those engaged in employment divided by the total population of the same age group.

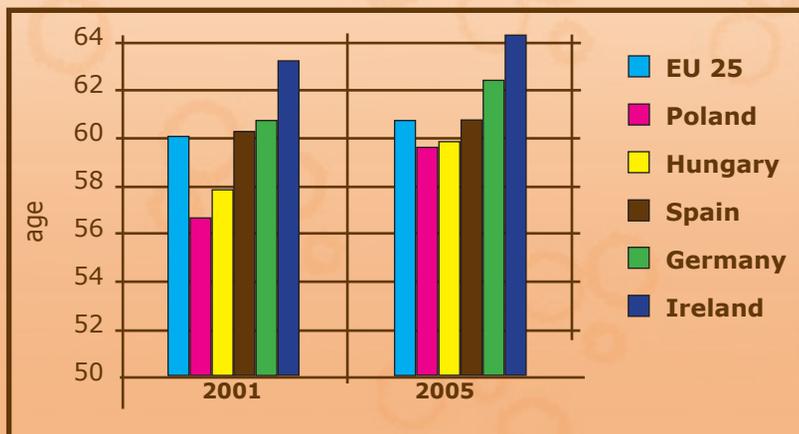
- The employment rate for older workers in Hungary nearly doubled, increasing from 17.3% to 33.6%,
- The employment rate is the number of those engaged in employment divided by the total population of the same age group.
- The employment rate for older workers in Spain increased from 35.1% to 44.1%,
- The employment rate for older workers in Germany expanded from 37.7% to 48.4%,
- The employment rate for older workers in Ireland increased from 41.7% to 53.1%.

Across the EU 25, the population of older workers comprises more men than women. However, for both, there has been an increase in levels of participation. Between 1998 and 2006, the percentage of women aged 55-64 in the workforce increased from 26% to 35%, while the population of male older workers increased from 47% to 53%. (Note: The figures for 2006 are provisional.)

### Exit Ages from Labour Force in EU and InterFAIR Countries

Figure 2 illustrates that, in recent years, the average age for leaving employment has slowly increased across EU Member States. In 2001, the average exit age was 59.9 years - this had increased to 60.9 years by 2005.

Figure 2: Average Exit Age from the Labour Force for selected countries



Source: Eurostat. The figure shown for Germany for 2005 relates to 2004.

**In summary, the average rate of employment across the European Union has increased in recent years. More older people are participating in the labour force and are, on average, exiting employment at a later age.**

## Some sources of information on Older Workers in the EU

European Commission (2005), COM (2005) 94 final: Communication from the Commission: Green Paper "Confronting demographic change: a new solidarity between the generations, Brussels: Commission of the European Communities. (Information on the changing demographic profile of Europe.)

[http://ec.europa.eu/employment\\_social/news/2005/mar/comm2005-94\\_en.pdf](http://ec.europa.eu/employment_social/news/2005/mar/comm2005-94_en.pdf)

Eurostat statistics (1995-2006) on employment rates across Europe and including the US and Japan:

[http://epp.eurostat.ec.europa.eu/portal/page?\\_pageid=1996,39140985&\\_dad=portal&\\_schema=PORTAL&screen=detailref&language=en&product=STRIND\\_EMPLOI&root=STRIND\\_EMPLOI/emploi/em011](http://epp.eurostat.ec.europa.eu/portal/page?_pageid=1996,39140985&_dad=portal&_schema=PORTAL&screen=detailref&language=en&product=STRIND_EMPLOI&root=STRIND_EMPLOI/emploi/em011)

Eurostat statistics (1995-2006) on employment rates of older workers (55-64) across Europe, the United States and Japan.

[http://epp.eurostat.ec.europa.eu/portal/page?\\_pageid=1996,39140985&\\_dad=portal&\\_schema=PORTAL&screen=detailref&language=en&product=STRIND\\_EMPLOI&root=STRIND\\_EMPLOI/emploi/em014](http://epp.eurostat.ec.europa.eu/portal/page?_pageid=1996,39140985&_dad=portal&_schema=PORTAL&screen=detailref&language=en&product=STRIND_EMPLOI&root=STRIND_EMPLOI/emploi/em014)

Eurostat statistics (1995-2006) on employment rates for female and male older workers (55-64):

[http://epp.eurostat.ec.europa.eu/portal/page?\\_pageid=1996,39140985&\\_dad=portal&\\_schema=PORTAL&screen=detailref&language=en&product=STRIND\\_EMPLOI&root=STRIND\\_EMPLOI/emploi/em016](http://epp.eurostat.ec.europa.eu/portal/page?_pageid=1996,39140985&_dad=portal&_schema=PORTAL&screen=detailref&language=en&product=STRIND_EMPLOI&root=STRIND_EMPLOI/emploi/em016)

[http://epp.eurostat.ec.europa.eu/portal/page?\\_pageid=1996,39140985&\\_dad=portal&\\_schema=PORTAL&screen=detailref&language=en&product=STRIND\\_EMPLOI&root=STRIND\\_EMPLOI/emploi/em015](http://epp.eurostat.ec.europa.eu/portal/page?_pageid=1996,39140985&_dad=portal&_schema=PORTAL&screen=detailref&language=en&product=STRIND_EMPLOI&root=STRIND_EMPLOI/emploi/em015)

Eurostat statistics (2001-2005) on average exit ages from the labour market:

[http://epp.eurostat.ec.europa.eu/portal/page?\\_pageid=1996,39140985&\\_dad=portal&\\_schema=PORTAL&screen=detailref&language=en&product=STRIND\\_EMPLOI&root=STRIND\\_EMPLOIemploi/em021](http://epp.eurostat.ec.europa.eu/portal/page?_pageid=1996,39140985&_dad=portal&_schema=PORTAL&screen=detailref&language=en&product=STRIND_EMPLOI&root=STRIND_EMPLOIemploi/em021)

Information on the general employment profiles of Europe, United States and Japan.

[http://epp.eurostat.ec.europa.eu/portal/page?\\_pageid=1996,45323734&\\_dad=portal&\\_schema=PORTAL&screen=welcomeref&open=/&product=STRIND\\_EMPLOI&depth=2](http://epp.eurostat.ec.europa.eu/portal/page?_pageid=1996,45323734&_dad=portal&_schema=PORTAL&screen=welcomeref&open=/&product=STRIND_EMPLOI&depth=2)

Newsletter from the Directorate for Employment, Labour and Social Affairs on older workers

<http://www.oecd.org/dataoecd/54/47/35961390.pdf>

## 2. WHY FOCUS ON OLDER WORKERS?

Focusing on older workers is essentially an equality issue. Europe is facing unprecedented demographic change. The Union's population is set to grow just slightly from 458 million in 2005 to 469.5 million in 2025 and then to 468.7 million in 2030.<sup>6</sup> The relevant concern to this booklet, is that the total working population (15-64 years) is due to fall by 20.8 million. The report from the High Level Group chaired by Wim Kok emphasised how the ageing population of EU must be actively managed. To meet this challenge the Lisbon Agenda laid out policies and targets to focus on getting people jobs – especially certain groups including older people.

Recently,<sup>7</sup> three noted trends have been highlighted

- Continuing increases in longevity as a result of considerable progress made in health care and quality of life in Europe: health life expectancy is still rising.
- Continuing growth in numbers of workers over 60, will stop only around 2030 when the baby boomer generation will become elderly.
- Continuing low birth rates in Europe.

These trends have led to political priorities underpinned by the Lisbon Agenda of greater employment participation for older people. Many older people will be more active and in better health. Many will also be better off, if they have built up a full pension and have more savings than their predecessors and their children. But not all.

For each pensioner in Europe, there are 3.5 workers who contribute to the retirement income of that pensioner. By 2020 this ratio will deteriorate to 2.5:1. While the European Councils of Lisbon and Stockholm have set targets for raising employment rates for older workers to move from 38.5% in 2001 to 50% in 2021.

A number of key issues were identified as relevant to the matter:

- Essentially older workers were identified as a valuable source of labour supply in the context of EU-wide labour shortages and the ageing population of EU has pushed this issue up the agenda of labour market policy concerns.
- For some older workers change and adaptability can be more difficult, so we need to focus on the barriers.
- An examination is required of the factors that impact on both participation and access to employment of older workers.
- Residual negative attitudes towards older workers by employers and a focus in previous decades on early retirement have adversely impacted on their participation in the labour force.

<sup>6</sup> Green Paper "Confronting demographic change: a new solidarity between generations" EC, Brussels 6.3.2005. (Comm (2005) 94 final).

<sup>7</sup> Towards a Europe for All Ages – COM (1999) 221, 25.2.1999: Europe's response to World Ageing – COM (2002) 143, 18.3.2002.

- Growing interest in promoting human capital potential of workers in mid life – focus on life long learning and education and training across one's career is seen as important in developing older worker's human capital.
- Active ageing raises the quality of individual lives and at the same time, at societal level, contributes to higher growth, lower dependency and cost savings in pensions and health.

Policy across EU is focused on both supporting and encouraging those moving towards being older workers to stay in the labour force, using training and development supports and incentives to make this happen coupled with actions to animate those older workers outside the labour market to be recruited and engaged.

### **3. WHY EMPLOY OLDER WORKERS?**

- **Older workers need and demand to be active.**
- **Older workers can act as a support to younger less experienced workers and thus help to 'hold the company memory'**
- **Older workers are available and are a resource for EU employers.**
- **With the shortage of proper pension provision across the EU at present, keeping workers employed longer will help alleviate this problem.**
- **The EU economy needs older workers to meet the needs of the labour market.**
- **There is an allied gender issue here, more older women live in poverty than men and women live longer than men, older worker retention will support a move out of poverty for women.**

## **4. DISPELLING THE MYTHS ABOUT OLDER WORKERS**

### **Myth 1.<sup>8</sup> Europe's workforce is old NOT TRUE!**

The age of retirement is becoming increasingly distant from the age at which many people may be considered to become old. It is no longer correct to describe those of 60-65 years as "elderly" with people living longer being more healthy and active, this term is now more correctly used for those over 75 years.

### **Myth 2. Older workers are retiring as soon as possible NOT TRUE!**

The reality is that the age at which people retire depends on their job and their level of health, not their actual age. Poor working conditions contribute to early exit from employment along with accidents and ill health, also poor job satisfaction and lack of motivation to stay. If these barriers to staying are overcome many workers are choosing to stay on longer in the workforce.

### **Myth 3. Older workers are unwilling or unable to adjust to new technologies NOT TRUE!**

The reality is that older workers can be as adaptable as younger workers. Age does not in general diminish workers' ability to do their jobs. The WHO report Active Ageing a policy framework<sup>9</sup> points out that reduction in physical and cognitive capacity that comes with age can be compensated for by the corresponding increase in experience, knowledge and wisdom.

### **Myth 4. Older workers are too expensive NOT TRUE!**

The reality is that companies can benefit enormously from older workers. Many firms view the personal qualities of older workers and the skills acquired during their careers as important company assets which more than compensate for any additional overheads. In particular, accuracy, reliability and good communication skills are difficult to replace. Companies invest in older workers because they see the business case for doing so.

### **Myth 5. Older workers are absent more often NOT TRUE!**

The reality is that most employers find older workers to be especially loyal and once in good health are more likely to be at work and do not feature in absentee worker figures.

<sup>8</sup> Foundation in Focus, issue 2 Sept. 2006. Age and Employment. European Foundation for the Improvement of Living and Working Conditions..

<sup>9</sup> Active Ageing: A policy framework. WHO. <http://www.who.int/ageing/publications/active/en/index.html>

**Myth 6: Older workers can't or won't learn new skills  
NOT TRUE!**

The reality is that those over 50 are proving their ability to learn new skills by becoming the fastest growing group of Internet users. And career-changers in their 40s and 50s are taking courses to enhance their skills.

**Myth 7: Older workers don't stay on the job long  
NOT TRUE!**

The reality is that workers between 45 and 54 stayed in the same job twice as long as those aged 25 to 34, according to the US Bureau of Labor Statistics in 1998. Low turnover among older workers and higher turnover among younger groups translates into higher recruiting, hiring, and training expenses.<sup>10</sup>

**Myth 8: Older workers aren't flexible  
NOT TRUE!**

The reality is, because they've seen many approaches fail in the workplace, older workers are more likely to question change. But they can accept new approaches just as well as younger workers, as long as the rationale is explained.

**Myth 9: Older workers cost a company more  
NOT TRUE!**

In reality accidents and attendance records are better for older workers.<sup>11</sup> They tend to be more careful on the job. They have a strong work ethic, are dependable and responsible.

<sup>10</sup> Source: Institute of Electrical and Electronics Engineers, USA, 2006.

<sup>11</sup>Source: US Department of Labor, AARP, Senior Employment Program of "The Senior Source" Dallas, 2006.

## **5. ACTIONS PROMOTING RECRUITMENT AND RETENTION OF OLDER WORKERS IN THE LABOUR MARKET**

- Introduction of national, regional and enterprise level policies that promote and support active ageing are essential.
- Improving current working conditions to entice workers to stay in the workforce: age-adjusted shift working has proved successful for some workers.
- Reverse earlier trends of offering early retirement schemes for older workers: Phased retirement schemes are becoming more popular with workplaces and workers.
- Experiment with new ways of organising work and work time to attract older workers to stay in the workforce.
- Ensure that all recruitment policies are proofed to comply with best practice in selection and recruitment of employees and free from ageism.
- At enterprise level adopt individual approach to each older employee – they are individuals and this approach works better than a general approach.
- Provide appropriate care provision for workers with care responsibilities in order to address issue of those leaving the workforce due to their child or elder care responsibilities.
- Devise age management strategies at enterprise level.
- Ensure a health management strategy at enterprise level includes older workers' health priorities.
- Create networks of employers willing to recruit older workers.
- Include older workers' needs in HR development strategies and change management plans.
- Offer opportunities for greater work-life balance to workers to entice some workers to remain in the workplace with extra time for leisure and family.

## **6. TRADES UNION SUPPORTED ACTIONS TO SUPPORT OLDER WORKERS IN THE LABOUR MARKET**

### **1 from Poland: Good Practice of Partnership: Equal Chances**

In recent years, unemployment and restructuring of companies in Poland has affected many older workers. A most frequently asked question relates to how to deal with general rising unemployment and the effects of company restructuring that has led to redundancies, particularly impacting negatively on older workers.

The trade union Solidarity, at national level in Poland, tried to face these problems. However, initially the response was limited to the protection of workplaces and organising protests.

In order to overcome the problems it was seen as important to build up social dialogue and take up common activities by all affected. Using the EU Initiative Equal it was possible to implement complex and well-planned activities for employees and employers in affected companies.

A tool was developed and was called 'Fast Reaction Method'. It was decided to test it in five districts. The first steps were difficult. How to build Partnership in order to achieve aims? Would trade unions associated with strikes and politics be treated as a serious partner? By knocking at the door of various institutions and organisations, presenting project basic principles, we encouraged our partners to cooperate. They joined with us in the project 'Equal Chances'.

Since then the representatives of the regional government, organisation of employers, trade unions, training institutions supported by academic teachers have become involved and have helped to break down prejudices. Each of the partners analysed their own experience, assuming that the method being tested would not only help its direct beneficiaries, but also the institutions or companies themselves under threat. Thus, partners changed and improved their activities. Helping companies in difficulty, we learned, must be early and precisely planned. Considering the size of the company, training and workshops for the company must be prepared for small groups. What counts is the variety of issues addressed adapted to the actual needs of both the employer and employees.

Small, medium and especially micro-companies are dominant in our province. They employ thousands of people. Without those workplaces we would not be able to strengthen the position of our province and equalise the chances of our inhabitants with our European colleagues. The method has been tested and implemented and allows us to reach the company requiring change. It provides support and practical tools for the company owner and new capabilities and knowledge for the employees. At the same time it gives a chance of survival to both the company and the employees in the market and maintains workplaces.

The process of helping the companies consists of three stages. Firstly, a diagnosis of the economic situation of the company leads to designing an improvement plan. After this the training and counseling phase is initiated. The most effective forms of training interventions

are workshops where the employer works with the help of an expert. The workshops are also dedicated to human resources management that aims to strengthen competitiveness of the company in the field of production or services.

It is important to change the attitude of trade unions to the problem of protecting employment. Protection of workplaces which will not survive economically is simply inefficient and not a good practice.

It's important to strengthen the position of an employee going onto the local labor market by shaping his image and perception of himself so that he is well-prepared, qualified and mobile candidate for any new position. To reach this objective we prepared 'Friendly Aid Groups', counselors, whose task is to help the employees of the restructured companies. Members of those groups derive mostly from trade union environment 'til now had fought for workplaces, now they are responsible for helping people facing unemployment, supporting them in retraining or searching for a new workplace. The major role of the counselor is to be with such a person in difficult moments of their work life. Most of these participants are older workers requiring retraining and reorientations for continued employment.

Activities at the company level are supported by 'Fast Reaction Groups'. These are people who support co-operation between institutions and organizations in the local labor market. Such an approach allows the best solutions for cooperation and overcoming a crises to be worked out at the most local level, which is always different regardless of the area.

Improving resources and practices of each company became the basis for a better application at team level. Thus, some of the unemployed retrain and find jobs. In one district a method of strengthening the competitive position of a local employer was developed.

The individual elements of Fast Reaction Method are now being promoted. We want to convince and encourage trade unionists from Poland to implement it.

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## **2. Ireland**

As part of the latest ten year social partnership agreement known in Ireland as Towards 2016, Section 32 of the agreement deals specifically with older people. The parties to the agreement i.e. the government and social partners share a vision of a country which provides the supports, where necessary, to enable older people to maintain their health, well-being as well as to live active and full lives in an independent way in their own homes and communities for as long as possible.

The actions include a number of areas which will be given priority over the life time of the agreement. Specifically in relation to the employment of older workers there is a commitment to promote education and employment opportunities for older people.

This is also in the context of the changing demographic patterns, a

key objective for the parties to maximise the opportunities for older people to participate in education, employment and other aspects of economic and social life. This will include targeted adult and community educational opportunities. Older people will be encouraged and supported to access further and higher education and appropriate targets will be set in the context of proposals on life-long learning and access to further and higher education.

A cultural mindset change will be promoted among both employers and employees to encourage older workers to remain in employment. Promotion of training and upskilling of employees particularly in low-skilled/older workers will take place to enhance employability in the context of the impact of globalisation. Training and advisory services including those provided by FAS (The National Training Authority) and the promotion of training and upskilling of employees will be encouraged.

The exploitation of information and communication technology to improve the quality of life of older people and assist them in independent living. Public campaigns to tackle ageism will continue to promote initiatives over the course of the agreement, these will include agencies like The Equality Authority, the Health Services Executive (the employer of the health sector) and the National Council on Ageing and Older people.

### **Case Study (Ireland) Senior Select Retain and Retrain: Choices @50+**

SSRR programme is an initiative of a partnership of organisations in Ireland. It aims to explore new ways of supporting the development, recruitment and retention of older workers through local partnerships involving older workers and job seekers, employers and recruitment agencies and to disseminate results with a view to influencing future employment policies and practices.

The partnership, supported by the EQUAL Community initiative and local partner organisations working together is Age Action Ireland (an NGO working on issues for older people), FAS (the national training agency), Irish Congress of Trades Unions (all Ireland body of trades unions) and Partas (a local community based employment support service). The South Dublin Chamber of commerce is also involved and provides valuable links to local employers.

The SSRR has developed 'Choices@50+' which is a HR consultancy programme to assist both employers and employees alike in addressing the needs of older workers. It includes working with company management to support the placement and retention of older workers.

Lots of companies don't recognise people aged 50+ as potential employees. They see them as slow to embrace new skills or too set in their ways to be of any real benefit to them. Many companies on the other hand see beyond this stereotypical view. They see the real benefit of experience, reliability and solidity that a more mature worker may have to offer. Furthermore, they see the mentoring potential that such workers have and the consequent benefits that can be passed on

to the younger employees. They embrace all these qualities.

Like many staff, there may be some skill shortages, but these can be dealt with through training. The companies which target older workers in this manner do so not for philanthropic reasons but for sound business and tangible commercial benefits.

### **What companies get in the programme**

While the programme content varies from company to company it includes:

- Skills audit of older workers
- Career development and planning
- Individual and group mentoring
- Information and awareness on diversity and equality issues for all management and staff
- Sector specific skills training
- Company policy and procedure advice
- Detailed reporting on staff progress after the programme.

Participation is free to employers and development officers call to companies to make contact and explain the programme and its benefits. The older workers participate in a one day career development review where they are given the opportunity to identify their skills, personal achievements and examine their future career paths. They are also introduced to the concept of workplace mentoring.

The programme also runs a workshop for recently displaced employees over 50. This programme allows participants to explore their feelings, accept change and recognise their potential and develop a future career direction. This workshop may lead to a follow-up in which the willing older worker participates in a series of sessions which include a workshop for returners to the workplace and a self assessment and awareness and information gathering process in which they complete personality tests, aptitudes and orientation towards work.

On completion of the workshops over 50+'s can take up a further series of workshops on issues including: self marketing skills, interview techniques, skills development, coaching and mentoring. The programme has been successful and is currently being examined for more mainstream national application.

For further details please contact: [ssrr@partas.ie](mailto:ssrr@partas.ie)

## **7. MODELS OF GOOD PRACTICE IN PROMOTING THE EMPLOYMENT, RETENTION OF OLDER WORKERS. CASE STUDIES FROM PARTNERS.**

### **1. Case study, Dublin, Ireland**

Equal at Work 'Audit of policies and procedures at a large urban hospital to examine the needs of older workers'

The Adelaide and Meath Hospital incorporating the National Children's Hospital (AMNCH) was opened on its present site in June 1998. It is the largest capital investment in healthcare ever undertaken by the Irish State. It was completed at a cost of €178m. A public voluntary teaching hospital, it provides child, adult, psychiatric and age-related healthcare to the local, regional and national public. The hospital has 600 beds and in 2005 treated 21,035 patients on an in-stay basis, 24,197 day cases and 204,703 out-patient appointments. AMNCH employs 3,000 people.

In April 2004 legislation was introduced in Ireland which removed the compulsory retirement age for new entrant public servants and raised the standard minimum retirement age from 60 to 65 years. AMNCH realised that the change would impact on employers and workers and require a strategy to meet the demands and issues which arise in the new era without a formal retirement age. AMNCH decided to use the Equal Initiative to address this issue through the Dublin Employment Pact's Equal at Work project.

The key aim of the Equal project at AMNCH was to open up opportunities for older workers and to encourage and promote their inclusion and active participation in the workforce in light of the above mentioned change.

The main objectives of the project were to:

- Identify the barriers to recruitment and selection for older workers at the hospital.
- Look at the promotion of older workers and the opportunities that exist within the organisation.
- Promote awareness as to the benefits of an older workforce and introduce proactive measures to harness the current and future potential of older workers in the workforce.

#### *Process of the project*

A steering group was established which consisted of representatives from the Recruitment and Selection department, Training and Development, Human Resources, Occupational Health, Superannuation, Nursing area, a member of the hospital partnership committee and representatives from IMPACT and SIPTU, the two largest trades unions at the hospital.

An external consultant was appointed to review practices and recommend systems, policies and procedures that could be created in order to harness the existing and future potential of older workers. The review comprised four key elements:

### *A. Quantitative data gathering*

A detailed questionnaire was issued to 900 staff. This survey was used to gather data first-hand on the position, experiences, attitudes and perceptions of staff from across the hospital. 278 completed questionnaires were returned representing a response rate of 30% of staff from all grades and professions.

### *B. Qualitative research data*

Focus groups and interviews with key stakeholders were organised. A series of six focus groups were conducted as a means of gathering additional qualitative data on the attitudes, perceptions and feelings of staff in relation to older workers. In addition to the focus groups, the audit team held individual telephone interviews/ discussions with a number of external and internal key stakeholders. These interviews were held to identify some positive action measures and good practice that could be incorporated into practices and procedures throughout the health services.

### *C. Audit of policies and practices*

Relevant HR and equality policies and procedures in the hospital were reviewed in order to explore good practice initiatives relating to older workers. In surveying and reviewing this material, the consultant made a strong reference to age related criteria in the recruitment, selection and progression of staff by examining job specifications, job competencies, occupational qualifications, advertising, record keeping, and access to employment. 350 of recruitment competition files were selected from competitions run between June 2005 and June, 2006, 88 (25%) were examined as part of this review.

### *D. Literature review*

A literature review was conducted to profile best practice in promoting positive action for older workers based on a selected set of national and international case studies.

### *E. Action Planning Day*

Having gathered and analysed all the data, an Action Planning Day was scheduled with the steering committee to review the findings of the report and to prepare an action plan for phase two of the project.

### *F. Final Report: Findings*

The final report was launched in early February 2007 and revealed many positive findings in relation to older workers including the following: Recruitment and selection systems were identified as well structured and in line with best practice.

Older staff were positive about training opportunities and promotion procedures.

- A greater proportion of staff over 50 years would like to continue to work beyond age 65, compared to staff under 50.
- There was a positive image of working conditions at the hospital, including a high satisfaction with the job itself, working hours and earnings.
- Only 16% of the workforce were over 50 years of age. There is not an equal representation of older workers across the range of jobs.
- Majority of respondents over 55 years had not received

preretirement training.

- Respondents aged 60 were less confident in gaining promotional opportunities and do not feel career opportunities exist for them.
- Older workers do not avail of flexible working arrangements especially those over 60 years.

### *Recommendations*

On the basis of the review and findings as presented in the report, a number of key recommendations were made to assist in developing and promoting specific actions to support the development of equal opportunities for older workers within the hospital.

A key recommendation was the introduction and evaluation of a positive initiative to advise older workers of the options open to them in relation to a career in the hospital. The programme is to be entitled 'Options for Me Programme' - Career Opportunities for Older Workers'.

### *Programme initiative*

The programme will address some of the findings highlighted in the report. The following are a number of the agreed key objectives:

- Identify areas in the hospital where older workers are employed
- Encourage older workers to engage in the necessary training to advance and promote their career progression options
- Provide advice and information on health promotion ideas
- Advise on financial planning, work life balance initiatives
- Provide an awareness training for the integration of younger and older staff
- Enhance the quality of work for older workers and promote a positive working environment
- Provide information on the options for those who want to stay past traditional retirement age;
- Pilot a continuous service option for a cohort of workers contractually required to retire at 65 and evaluate the initiative;
- Provide awareness training for the integration of younger and older staff.

The report also identified a number of other proposed initiatives that will form part of the HR Strategy over the next couple of years. Such actions included:

- Develop an occupational health/ergonomic programme in order to create a safe and healthy work environment for older workers and to make reasonable accommodation to ensure the older workers can engage fully in workplace activities.
- Develop the Employee Assistance Programme (The Employee Assistance Service is a confidential, independent service for employees of the hospital. It provides information, support and assistance on a number of matters that may impact on the work life of a staff member. It's a free and confidential service. Some of the services include counselling, money management and legal information.)
- Develop services to provide supports to older workers in life coaching and planning for retirement.
- Develop a mentoring programme as part of the succession planning process in order to share knowledge and transfer skills.

- Create a bank of temporary staff utilising the skills and expertise of retired staff from within Clerical/Administration – Nursing or other areas to cover short term gaps in service.

The hospital is keen to proactively address and implement the recommendations contained in the report. They are committed together with the hospital partnership group to addressing the challenges of and for older workers in a positive way.

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## **2. Case study, Nuremberg, Germany**

Equal project under Nuremberg EQUAL Development Partnership FAIR plus on age-suitable working time schemes

This project is a human resources development programme designed to meet the challenges of demographic change in companies.

### *Introduction*

An ever growing number of companies recognise that it is useful and necessary to start new human resource policy approaches to meet the challenges of demographic change in companies. Apart from a declining labour force, firms will have to face the problem of an ageing workforce.

Against the background of the changes foreseen and the limitation of early retirement practices, innovative age-suitable working time schemes are getting more and more important. They can contribute, together with human resource and organisational development schemes, to

- prolonging the employability of older workers and
- keeping them in companies free from serious health problems.

### **Process of project**

The project 'Age-suitable working time schemes' began with an examination of results from an employer survey. Its aim was to target current information on firms' present and future activities in the field of working hours arrangements. There were also questions on the introduction of human resource development schemes in general.

The postal survey was carried out in September/October 2005 in North Rhine-Westphalia, mainly in the Dortmund region. Altogether 50 firms with more than 10 employees participated in the survey.

The survey was answered by personnel managers, staff and works councils and individuals participating in company development processes. Information is supplied below about companies' present approaches towards age-suitable working time schemes and future plans.

### *The participating companies – size and structure*

50 firms of different size participated in the postal survey:

- small enterprises with less than 50 employees (18%)
- medium-sized enterprises with 50 – 249 employees (34%)
- large-sized companies with more than 250 employees (42%)

- no detailed information (6%)

The firms belong both to the manufacturing and the service sector:

- chemistry/mining / energy (18%)
- metal/steel industry (40%)
- service sector (about a third)

#### *Age structure of the employees*

The average age of the employees is 41.4 years. Behind this figure there are workforces with a different, age-specific distribution:

- average employees' age below 40 = young enterprises (22%)
- average age between 40 and 44 = medium-aged enterprises (40%)
- average age more than 45 = older workforces (16%)
- no detailed information (22%)

This result shows that in particular those companies who participated in the survey see the need for older worker measures in human resource policy schemes at present or in the near future because of their current age structure.

#### *Working hours and working time schemes in the companies questioned*

Both in shiftworking (60%) and non-shiftworking companies (40%) there was a high tendency to build on flexible working hours, in order to meet customers' demands as well as the employees' needs.

More than 60% of the firms had introduced working time accounts, with varying compensatory periods between one month and more than a year. There are even some experiences with long-term working time accounts. Apart from different forms of flexible starting and finishing time (50%), almost a third of the companies interviewed have already introduced working time schemes, these companies are interested in further developing their working time schemes against the background of demographic change.

#### *Managing the flexitime requirements from the managers point of view*

About 92 – 96% of the managerial staff think that it is (very) important to be able

- to react to flexibility demands in the short term as well as
- to cope again and again with new requirements in view of
- working time.

The managers think that it is primarily workers under fifty years that are willing and able to cope with flexible time requirements. As a rule, managers don't think that there are positive effects on working time arrangements, resulting from their experience of older employees. Companies depending on flexible time schemes have to face the challenge to meet this requirement with an ageing workforce.

### *Information on demographic change and future requirements*

Most of the firms interviewed are well-informed about demographic change, ageing workforces and the growing importance of an age-related shaping of work and work organisations:

- 66% of the managers and executives have had this information for more than two years
- 16% have had it for one until two years
- 10% got the information in 2005
- 8% don't have any information about the consequences of demographic change

The importance of raising awareness in companies on this issue was highlighted by the fact that about 80 per cent of the managers see a present need for age-related integration policies in their firm.

### *Implemented and planned schemes to meet the requirements of an ageing workforce*

In about 40% of the companies human resource policy schemes have already been introduced. 39% of the firms are presently planning the introduction of such schemes. The introduced and planned human resource development schemes are:

- new recruitment (64% introduced/ 18.9% planned)
- health promotion schemes (55% introduced/ 15% planned)
- setting up mixed age groups in teamwork (41.7% introduced/16.7% planned)
- tandem models (32.4% introduced/ 20.6% planned) young and old together
- mentoring models (24.3% introduced/ 8.1% planned)
- recruitment of older people (introduced 22.2%/ planned 13.9%)
- age-specific further training (13.5% introduced/ 27% planned)
- age-related shaping of the workplace (introduced 11.1%/ planned 22.2%)
- age-suitable career paths (introduced 8.3%/ planned 16.7%)

On the whole, the companies took advantage of a wide range of human resource and organisational development strategies. On top there is new recruitment – more than two thirds of the firms recruit staff to compensate for departing older employees and the loss of know how. About 20% of the firms count on the advantages of older workers and have recruited people aged more than fifty.

Widely spread are measures which are promoting good health among employees (ergonomic workplaces and work systems, reduction of stress factors in the working environment, training in ways of working which protect health or planning working hours which are less burdensome). More than 50% of the firms contribute to keeping employability in this way.

In about two fifths (40%) of the firms age-mixed teams are regular part of human resources planning schemes. If the firms implement their plans, in about 60% of the enterprises the direct co-operation between young and old will be reality. In-company age-suitable training programmes (lifelong learning) are also planned..

### *Age-related working time schemes*

Age-suitable working times can be developed with regards to the duration and distribution of working hours. Such as, for example:

- reduction in working hours,
- temporary part-time work (50.9%),
- special leave (39.2%),
- cut in working hours without full pay (38.5%),
- cut in working hours with full pay (12 %),
- additional days of vacation (9.8%).

So far, the firms interviewed primarily focus on reducing working hours during employment. In about half of the enterprises there are regulations for temporary part-time work with an option of returning to full-time work again.

With a view to flexible working hours schemes regarding the distribution of the daily working time, 45.1 % of the companies maintain that flexible starting and finishing times are possible and are made use of.

Temporary part-time work with an option for a full-time job is almost exclusively made use of by younger employees (until 34 years). They are interested in flexible time arrangements during the period of childcare. Part-time employment and daily flexitime is in particular made use of by employees aged 35 to 49 years. Special leave and additional days of vacation are taken advantage of from employees of all age groups. Working time changes, especially directed to older employees do not (yet) exist in the companies interviewed.

In particular firms, in which workers do shift work innovative working time schemes are vital to reduce job strain. When developing shift schemes, some enterprises take into account the experiences of industrial science studies. Apart from the above mentioned possibilities of reducing working time some changes in work organisation – possibly individually agreed – can contribute to a reduction of work strain. For example, a cut in the length of shift periods during the day and during the night (15.2%) and more short breaks (15.6%). Changes in work organisation with longer leisure and recovery periods are not very usual so far. It is the same with the reduction and the withdrawal from shifts which have a strong impact on physical and social stress: withdrawal from night shifts (9.7%) and reduction of work during the week-ends (3.2%). At this point the companies still seem to be at a piloting stage. After a first approach towards the 'demographic change challenge' with human resource policy schemes, they start in a second step with new working time schemes.

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### **3. Case study, Olstyn, Poland**

#### **Assets of people aged 45+ (An Equal Project)**

In Poland those over 45 years are recognised as having three key sets of assets for the labour market:

- extensive professional experience
- time availability
- ability to work in groups.

According to their immediate superiors, people aged 45+ may count on equal or even better employment possibilities in comparison with the younger ones in managing, specialised and scientific positions. Managers believe it is worthwhile to establish age-combined teams. Such teams prove to be more efficient, mainly due to the sharing experience and knowhow by the employees aged 45+.

*For further details please contact: [http://www.sojuszdlapracy.pl/index\\_en.php](http://www.sojuszdlapracy.pl/index_en.php)*

#### **Portfolio – The best candidates for employment**

Since 2001 the Institute for Local Partnership and Co-operation has developed many actions to help people who are discriminated against in the labour market. A lot of these people are unemployed, have low qualifications or obsolete trades. Some have a disability.

One idea of the Institute was to create a web site with information for people who are looking for a job. Each candidate prepares a short presentation (CV) of their qualifications, skills and important information that could encourage and convince an employer to choose and employ them. Many people aged 40+ put their CV on this web site. The important thing is that the CV of the person aged 40+ is placed among others, much younger. In this way they are provided with equal opportunity of employment.

Those seeking jobs also meet to see how they can enter the labour market and also to meet with employers.

*For further details please contact: <http://www.partnerstwo.org.pl/portfolio/>*

#### **The Third Age Institution**

Olstyn University of the Third Age is a university unit of Warminko-Mazurski University, which was created following a University Senate resolution adopted in 2000. The idea of the Olstyn University of the Third Age is to include older people in lifelong learning through promoting social activity on the basis of the development of interests.

The main activities include intellectual, mental and physical stimulation of seniors, as well as leading educational and cultural activity. Many students aged 50–60 come back to work or re-start very active life on the local labour market, as a result of their involvement with Third Age University.

*For further details please contact: <http://www.utwolsztyn.republika.pl/>*

## 4. Case study, Budapest, Hungary

### 40+ Chances and Opportunities Over Forty Foundation

The Forty + Foundation aims to

- promote the successful employment placement of people over 40 and the elimination of discrimination and disadvantage currently facing this age group in the labour market;
- reduce gender-based inequalities amongst those over forty years of age by promoting women's participation in the labour market and specifically helping to reconcile family and work responsibilities;
- enhance the employability of those over forty and assist in the reintegration of particularly disadvantaged sub-groups within the over forty group such as women, low skilled long term unemployed and Roma people;
- prepare people over 40 for retirement, helping them to lead a healthy and active life and ensure their financial security by encouraging them to make adequate provision for their retirement through investments/savings.

*Services provided:*

#### *A. Dissemination of information to employers*

The Foundation informs companies, institutions and SMEs about the ways and benefits of using labour market services and about employment policy benefits and supports available to employers employing people aged over forty.

#### *B. Dissemination of information to employees*

Potential employees aged over forty are encouraged to register with the Foundation, after which staff members conduct an in depth interview with the job seeker and give him/her detailed information in order to find a tailor made fit between the person and the employer.

#### *C. Job positioning*

The Foundation helps its clients (those over forty) to choose the best job offer in terms of the place and schedule of work, wages and terms and conditions.

#### *D. Advocacy – Legal issues*

Registrants are provided with advice and information on their legal entitlements and rights by the Foundation and on any entitlements they may have.

#### *E. Personal skills development – Job orientation – Codes of conduct – Communication – Job interview*

Registrants are also provided with pre-employment supports including personal skills development; help to discover which job best suits their interest and skills; and education on appropriate codes of conduct in the workplace setting; They also receive communication skills and finally support and preparation for the job interview.

#### *F. Healthy life style*

Registrants are familiarised with several health preserving programmes and on how to handle stress in everyday life. They may get acquainted

with traditional and alternative ways of healing and the importance of mental health.

#### *G. Investments/savings- Financial security*

Registrants are given financial advice on which bank offers the best savings plans to prepare for retirement. Also they are informed about the benefits of the different mutual savings banks.

For further details please contact: [www.negyvenfelett.hu](http://www.negyvenfelett.hu)

### **Hungarian Business Leaders Forum 50± Programme**

At the Hungarian Business Leaders Forum (HBLF) graduate job seekers over 50 years of age, being a relatively small group within the larger group of unemployed people have little contact with job centres and few adequate relations with companies that could employ them. The HBLF aims at developing efficient means of helping specifically older unemployed persons. It involves its 101 member companies (among them such renowned ones as Mol, Hungarian Telecom, Zwack, the World Bank, Shell Hungary) into developing strategies concerning older workers, and sensitising employers to the needs of the graduate older workers.

The HBLF's programme consists of three sets of services in which they:

- update the professional skills of participants so that they can respond better to labour market demands (this includes teaching them computer skills and languages),
- develop the soft skills of those graduates over 50 (the participants learn how to work in a team and how to communicate more effectively) provide
- psychological counselling, personal development and practical tips for job interviews such as writing CV's etc.

For further details please contact: <http://www.hblf.org/>

## 5. Case Study, Madrid, Spain,

### Training and Employment plans in Madrid

The Agency for Employment, during the year 2006, set up programmes which are projects of a temporary nature in which learning and qualifications are alternated with productive work in activities related to the recuperation or promotion of artistic, historic heritage, or culture with the rehabilitation of urban or environmental areas and the improvement of conditions of life in cities. They also include any other activity which may be of public use or of general and social interest allowing insertion of unemployed by means of the provision of professional experience to participants.

The mixed training and employment programmes developed by the Agency comprise:

- Municipal Occupational Insertion Workshops
- Workshop-Schools
- Employment Workshops
- Programmes of Works and Services.

Within those programmes, the **Programmes of Works and Services** is more specifically directed to the over 40's target group, making a special impact amongst women.

This programme consists of getting the participants hired to do a job or service for the Madrid City Council. Using training and real work experience, it becomes easier for users to obtain jobs and be inserted in the world of work.

- Building sector - Works to improve and keep the sports, social and cultural facilities of the city council of Madrid (183 workers participated in these programmes)
- Services sector – With different areas like: support to the young people information centres, programme to support information and spread campaigns of socio-cultural activities of the Madrid municipality, programmes to detect old people with high risks of social isolation, geriatric adaptations and technical aids at home for old people, support to the equal opportunities plan, bookbinding and restoration of the holding of the library of the City Council of Madrid (238 workers were involved in such programmes)
- Cleaning sector – Special campaigns of clearing: autumn campaign (leaves collection) and Christmas campaign (25 workers were involved)

During 2006 in those areas of work 64.3% of participants were older than 40 years and more than 75% of the participants were women and many had only primary education.

### Employment Plan for Women in Madrid

The New Employment Plan for Women of Madrid has been created to help address the difficult situation of women who want to enter in the

labour market who are over 35 years of age and find it difficult to be inserted into the world of work.

One of the areas is directed to women between 35 and 54 years old who left the labour market temporarily because of personal or family changes and who wish to return now, as older workers.

One of the specific objectives of this plan is to achieve the insertion of 40% of women into the Services sector, mainly in the areas of receptionist-telephonist and handling of Switchboards. These areas were selected after a needs analysis. The conclusions showed on the one hand, the need of companies to find qualified and motivated people to develop these jobs and on the other hand, the need of women between 35 and 54 years old to retrain themselves in the administrative sector to be able to come back to the labour market in an area that most of them know.

From the start in July 2005 there has been a participation of 4,169 women older than 35 years of age in this initiative.

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## 8. CONCLUSION

This booklet published by the InterFAIR partners seeks to promote the reality for employers of the benefits of retaining and selection of older workers in the workplace. It also seeks to show some innovative ways in which partners across the EU are tackling this issue, with best practice and clear examples described in the booklet.

Finally, the authors wish to thank the members of the Older Workers SIG of InterFAIR for their contribution to this publication.

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[www.skillsanalysis.org](http://www.skillsanalysis.org)

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