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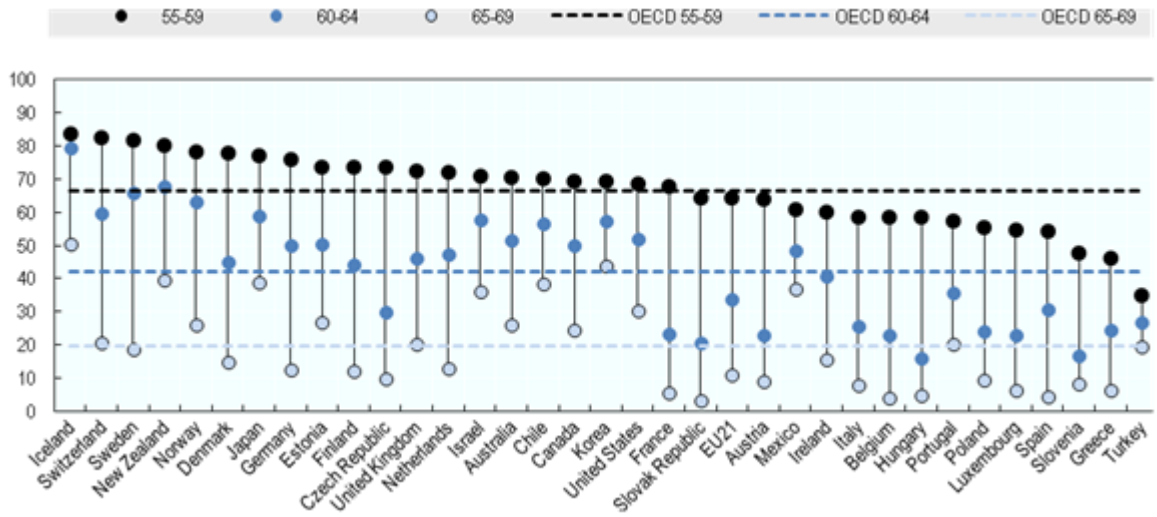
INTRODUCTION: DEMOGRAPHIC CHANGE AND THE CHALLENGE FOR AGE MANAGEMENT IN ENTERPRISES

Ageing populations represent a major challenge for society, the economy and the organisation of labour in OECD countries. As well as ensuring intergenerational equity and distributing the burden of an ageing society, a major challenge exists in how to organise work in enterprises in an efficient way. A working culture needs to be developed to allow older workers to stay longer in employment under favourable conditions and also to increase the productivity of older workers.

Changes in the employment patterns of older workers are already shaping labour markets. On average in OECD countries the employment rate of 60-64 year olds increased from 37.3% to 45.3% between 2003 and 2013 (stat.oecd.org). In a few countries, in particular in the Netherlands and Germany, employment rates have increased in an impressive way, while in other countries the rise in employment rates has been slower either because employment rates were already at a comparatively high level, (as in Iceland, Norway, Sweden, Switzerland, Japan, Korea and the US for example), or because of sluggish labour demand. In countries severely hit by the economic crisis, in particular in Greece and Portugal, employment rates of older workers even decreased. Growth in the employment rate could mainly be achieved through keeping older workers in employment longer. However, in OECD countries once older workers have become unemployed they have little chance of being recruited, even in countries with high employment rates. Overall, the employment rates of different age groups, the share of older workers in the workforce, the old age dependency rate and the speed of workforce ageing vary greatly across OECD countries. Figure 1 shows that the differences between the employment rates of older workers in the different countries increases tremendously approaching (pre-) retirement age: the employment rates of 55-59 year olds vary between 35% and 83%, 60-64 year olds between 16% and 79% and 65-69 year olds between 3% and 50%. The variation in employment rates between age groups within a country also differs greatly between countries, indicating more or less distinct segmentation lines by age.

Figure 1. Employment rates for people aged 55-59, 60-64 and 65-69, OECD countries, 2013

As a percentage of the age group



Source: OECD estimates based on national labour force surveys. OECD 2015a

Ageing societies and an ageing workforce challenge the functioning of the labour market, social security system and the current social compromise at all levels:

- *At the national level*, the rising age dependency ratio puts the financing of pension systems under pressure (for an overview of pension schemes see OECD 2013a as well as OECD country reviews, OECD 2013b, OECD 2014a,b,c, 2015). Pension reforms in a number of countries have already reacted by increasing retirement age, limiting or removing early retirement schemes and set incentives for workers to work longer as well as reducing replacement rates and thus lowering pension levels. New social compromises are being negotiated to solve the intergenerational distribution of the burden linked to demographic change.

  The intergenerational conflict is aggravated in countries with a high unemployment rate, as weak labour demand more typically affects the young people for a number of reasons (low level of experience, employment protection legislation, etc.). As long as aggregate demand cannot be enhanced, solutions are seen in an early labour market exit of older workers.

  In some countries, societies will not only be ageing, but the labour force is forecasted to decline in the near future or is already declining. The impact of shrinking labour supply on economic dynamics is worrying and finding solutions to overcome skills shortages is high on the agenda in some countries. Countries like Germany and Switzerland have elaborated national strategies in this respect (OECD 2014 a, Vogler-Ludwig et al. 2015). Raising employment rates of women and of older workers as well as of immigrants (in the case of Germany) are elements of these strategies with the aim of augmenting labour supply. A second key strategy is to offset decline in labour supply by increasing productivity. This calls for age management practices and training policies that increase productivity at all ages.

- *At regional or local level*, an ageing (and in some cases shrinking) workforce puts different types of local labour markets under threat. Local labour markets are embedded in the national setting of public pensions systems and labour market regulations. Local actors have little influence on this level of governance. Within a common institutional and legal setting, the shape, level and speed of demographic varies greatly between rural and urban areas, and between areas with strong and poor economic growth. On average in OECD countries, the share of the elderly population is higher in rural areas than in urban areas (18.6% vs 15.2%). Cities tend to have a more favourable age structure as they attract a younger workforce. However, the dynamics of ageing, measured by the annual growth of the elderly population between 2001 and 2011, was nearly twice as high in urban areas as compared to the rural population (OECD 2015b).

  The challenges of demographic change for local actors also differ between economically dynamic areas and areas affected by the crisis and a weak economic structure. However, in both cases problems of skills shortages and skills mismatch may occur and enterprises have to adapt to a changing age structure both internally and within external labour markets. The age structure of migration within a country and across borders has an influence on both labour demand and labour supply and may alleviate or aggravate problems within local labour markets.

  Coping with unemployment and in particular with long-term unemployment of both young and older people is a key challenge for local actors, such as PES and welfare offices. It affects local labour markets and local budgets, causing inequalities and poverty at the local level.

- *At sector level*, the impact of ageing societies and an ageing workforce has several dimensions. Ageing societies have an impact on consumer market characteristics and demand in certain sectors (e.g. person related or health related services). Most importantly, working conditions vary

quite significantly by sector and by occupation. Therefore the possibilities for extending working lives and increasing the productivity of older workers are not the same in different sectors and occupations.

- *At enterprise level*, the challenge exists in remaining competitive in a context of changing age structures. In addition to (dis-)incentives set by the institutional and legal settings, key determinants for the strategy of companies include the age structure of the workforce in the specific location of a company, the size of the internal (company) and external labour markets, and the size of the company. Companies have room for manoeuvre to cope with demographic change within the legal and institutional settings. Age management strategies have the potential to impact both labour supply and productivity gains.

- *At employee level*, it is important how the incentives to work longer and employment conditions are determined at national, sector, local and company levels, as they will influence the preferences of the workers. Furthermore, working and living environments have a crucial impact on the supply of labour as well as on workforce development. The challenge consists in setting the right incentives for workers not only to extend their working lives, but also to improve their productivity, working conditions and quality of life. Therefore, the quality of work as well as work-life balance needs to be addressed in companies through age management strategies.

The challenges at these different levels call for the implementation of comprehensive age management strategies at company level that take interrelationships between different HR policy areas into account and that take a life cycle approach. Research and the collation of best practice examples, which have been carried out mainly since the 1990s, have shown that holistic age management approaches, including work organisation, training, health measures, working time policies and other measures are the most valuable. They link the quality of work to potential for productivity increases. Research carried out at national level, at international level (OECD, Cedefop, European Foundation for the improvement of Living and Working Conditions, European Commission, ILO), and demography networks initiated by national and regional governments and companies, sector organisations and social partners have collected good practice examples at company level and have investigated what kind of age management strategies companies should develop in order to remain competitive. Such research and network activities provide a wealth of good practice examples at enterprise level. Main lessons from these examples will be presented in the next sections.

Nevertheless, survey results from different countries still show a relatively low implementation level of age management strategies (see e.g. survey carried out by ISFOL for Italy[1], Muller-Carmen et al. 2009 for Germany and the UK, OECD 2014b for France). Large companies have been developing age management strategies now for many years. In some cases these companies implement a double strategy: putting in place internal programmes for example to improve health and working conditions and promote training for older workers and at the same time ease early exit. Poor implementation of age management strategies in SMEs is widely acknowledged, although some SMEs implement some elements of an age management strategy in a pragmatic way, without elaborating an encompassing age management strategy (Lindley et al. 2006, Richert-Kaźmierska and Stankiewicz, 2014). Furthermore, it appears that companies are rather selective in the measures they implement (Muller-Carmen et al. 2009). Although it can be assumed that the level of implementation of age management strategies varies greatly between countries, the "knowing-doing gap" is generally regarded to be a major issue.

[1] Main results were presented at the OECD LEED expert Roundtable on 31 March 2015.

The choice of age management strategies or the absence of them is influenced by a number of factors. Policies aimed at promoting age management in companies need to take these factors into account. The following paragraphs give an overview of institutional, organisational, behavioural, demographic and economic factors that explain how enterprises are coping with demographic change.

Institutional factors

In particular, the pension and welfare systems set incentives for both employers and employees to either keep older workers longer in employment or use early retirement schemes. In the past the expansion of early retirement in a number of countries was the result of a social compromise on how to manage economic structural change. Consequently, an "early retirement culture" has been developed and companies have been giving advice to workers on how to prepare for retirement rather than preparing them for their final years of work. In addition to national schemes, in some sectors companies have offered generous early retirement schemes as a reward element (OECD 2014 a; Muller-Carmen et al. 2009). Demographic changes and costs incurred have put pressure on these companies to reduce the generosity of their schemes. In general, rising statutory retirement ages and more restrictive early retirement systems have led to an increased employment rate of older workers in many countries.

Low pensions may be a reason for high employment rates of older workers. In countries where the pension system rewards deferring pensions, and where pensions can easily be combined with income from work, pensioners tend to stay with their previous employers without a deterioration of their working conditions. Some pensioners also continue working as consultants to their former companies or other companies. Nevertheless, other pensioners may be in a position where they need to accept low wages and precarious employment conditions, for example as in Lithuania and Japan (Lindley et al. 2006, Duell et al. 2010).

Organisational factors

Companies with large internal labour market and lifetime employment models tend to hire younger workers rather than older ones. On the other hand they have a more long-term view on the careers of their employees and are therefore more open to developing age management concepts. Muller-Carmen et al. (2009) compare Germany and the UK and argue liberal market economies, such as the UK, which feature external labour markets focus on dismantling age related barriers to work which has often been termed age diversity. On the basis of company case studies, the authors characterise the approach of the German sample firms, which typically have strong internal labour markets, as "demography-driven" and the approach of the UK organisations as a "labour market/diversity-driven model" of age management.

Behavioural factors

Employer and manager perceptions of the productivity of older workers influence their behaviour with regard to recruitment, training measures for older workers and career development. Contradictory perceptions can be observed. While prejudices lead to discriminatory practices when it comes to hiring older workers, employer surveys show that they have a positive image of those older workers working in the company for a long time (OECD 2014a).

On the side of the workers, there are large differences between countries regarding the attitude and value attached to extending working lives. Particularly in countries where early retirement schemes were used for a long time to overcome industrial restructuring, there is a positive image in society about exiting the labour force early (in order to increase the acceptance of early retirement). In contrast, in a country like Japan it has been argued that work ethics cause society to take a more positive view towards working longer (Duell et al. 2010). The perceptions and attitudes of workers are also likely to depend on their health

status (OECD 2014a). Self-perception on productivity, expectations of further career development, and openness towards learning also determine the behaviour of older workers and impact their performance.

Economic factors and productivity

Keeping older workers in work might be beneficial for employers if they value experience and firm-specific human capital or relational capital. Firm-specific human capital loses its value when the older worker becomes unemployed.

The relationship between productivity and age is not clear-cut at first sight. While research on this topic has, in the past, focused on explaining declining productivity after a certain age (e.g. after 40 or 50 years old) (for an overview see Lindley et Duell, 2006; Gelderblom et Vos, 2009; Skirbekk, 2003) or at best found no relationship between age and performance (Bohlinger, van Loo 2010), newer research is pointing to areas where productivity increases with age. The heterogeneity of older workers with regard to productivity augments with age, as e.g. the value of experience, career paths, physical strains of work vary significantly among tasks and occupations.

The effect of experience itself is very divergent (Höpflinger 2009, Guest 2013, Lindeley et al 2006): (i) the number of years of experience in physically demanding professions is likely to decrease productivity; (ii) the positive effect of experience on the individual's job related learning curve can disappear after a certain period, e.g. 10 years, meaning that it makes no big difference whether the person has 10 or 20 years experience in their profession, or within the same company; (iii) the value of experience can be devaluated in cases where the work takes place within a highly innovative environment; (iv) for some professions the benefits of additional years of experience continue to increase (e.g. consultants); (v) experience can help to compensate for declined physical productivity. For example, in a Swiss insurance company, older workers were as productive as younger workers: they had fewer meetings with clients, but as they could better choose which products to offer they were equally successful (OECD 2014 a).

It needs to be taken into consideration that the measuring of productivity poses many problems in methodological terms (what is the right indicator?). Furthermore, there might be a creaming effect, as mostly healthy workers tend to remain in the labour market, while those with poor physical or mental health tend to leave the labour market earlier (Bloom et Sousa-Poza, 2013). Cohort effects in relation to qualification levels can affect differences in productivity by age, and prejudices and attitudes of employers can hinder a more productive use of the older workforce (Lindley et al., 2006, Zölch 2009).

Employing older workers is also regarded as beneficial for employers if this responds to the expectations and perceptions of clients (either because clients are older themselves, or because the tasks carried out require experience and age then has a signalling function).

Consequences for policy actions at local level

Age-neutral human resources management strategies would reduce age discrimination, and should be applied e.g. in the context of recruiting processes. However, in order to increase employability and productivity throughout working lives, age management strategies need to be developed. Thus, for policy makers at all levels, including local level stakeholders, the challenge consists of increasing incentives and conditions for enterprises to implement encompassing age management strategies and to develop a working culture, as well as to narrow the "knowing-doing" gap.

Key questions that arise are: How can companies be helped to understand the ageing challenge and to develop age management strategies? What needs to be done to increase the productivity of older workers? What needs to be done to promote inter-sector, inter-firm and inter-occupational mobility? What needs to be done to develop the skills of workers in the company? Section 2 gives examples of approaches and tools

helping the elaboration of age management strategies at enterprise level. Section 3 gives an overview of key elements of the working culture in enterprises that favour productivity gains of older workers. Section 4 takes stock of approaches that encourage inter-firm mobility and limit discriminatory hiring practices. Section 5 investigates the requirements for managing skills development and shaping training in order to maximise the productivity of older workers. Finally, conclusions for promoting age management practices that help to increase the productivity of older workers and the potential role of local stakeholders are drawn in section 6. This policy brief reviews a wide range of studies on the effect of an ageing workforce on the labour market and age management approaches at enterprise level, and includes the OECD work on "Working better with age", research carried out on age management for the European Foundation for the Improvement of Living and Working Conditions, for the European Commission, Cedefop, national ministries, social partners and research institutes. Furthermore, the OECD LEED Programme organised an expert round table on ageing workforces on 31 March 2015, where case study examples were presented. The following report draws the main lessons from this research and provides a number of case study examples.

TOOLS FOR DEVELOPING AN AGE MANAGEMENT STRATEGY AT ENTERPRISE LEVEL

Age management strategies need to respond to the different context factors, as explained in the introduction. Therefore, no "one fits all" strategy can be proposed. First, companies need to understand the challenges of an ageing workforce within their own organisations as well as the challenges posed at the local and national labour market levels. They need to adapt age management approaches to the company, sector and occupation, and the local labour market context.

To help companies to improve their age-related personnel management, and to take a comprehensive approach, tools for companies have increasingly been developed.

Benchmarking tools - the Work Ability Index

The "Work Ability Index" developed by Juhanin Ilmarinen in Finland is one the first concepts in Europe to be widely disseminated. A validated questionnaire called the Work Ability Index (WAI) was first introduced in Finland by the Finnish Institute of Occupational Health, in 1992 (Ilmarinen, 1999). The index includes variables on strain, autonomy, physical demands, enthusiasm, activity, education, vocational training, symptoms, etc. "Work ability" describes the balance between the work and the human resources. A number of factors influence a person's workability: the micro-environment outside work, such as family, relatives and friends; societal factors including legislation, infrastructure, economics, services, incentives, etc.; and most importantly the workplace environment. Competences and abilities have been classified into different floors (referred to as "the house of workability"). The bottom floor of the house comprises health and functional capacity (physical, mental, and social functioning). The second floor covers the dimensions of competence, and the third floor consists of values, attitudes and motivation. The fourth floor concerns factors of working life. Managers, supervisors and foremen have the power to organise and run the activities on that floor.

Since its introduction, the WAI has been implemented internationally and has become a key methodological benchmark of a comprehensive approach to "work ability". A number of projects use the Work Ability Index at company level.

For example, in 2007 the German car producer BMW decided to develop an innovative, bottom-up approach for improving productivity that the company is now testing and refining in plants in the United States, Germany, and Austria. This initiative was developed in BMW's 2 500-employee power train plant in Dingolfing, Lower Bavaria, as the forecasted age structure of the company led to a fear of an inevitable decline in the productivity of an ageing workforce in the years ahead. In this plant a pilot line project has been carried out in one of the most labour intensive lines to implement changes to improve productivity, such as managing health care, enhancing workers' skills and the workplace environment, and implementing part-time policies and change management processes. The company used the Work Ability questionnaire as one of their tools. As a result the 70 changes made increased productivity by 7% in one year, bringing the line level with lines in which workers were, on average, younger (Loch et al. 2010).[2]

[2] The company already pursued an age balanced hiring policy in the context of setting-up a new plant in Leipzig in 205, Eastern Germany. Given the mixed age structure, BMW pursues a strong investment in occupational health measures (OSH) to maintain the work ability of its workforce (Lindley et al. 2006).

Benchmarking the implementation of a lifelong employability approach

A recent example of assessing and benchmarking age management practices and the need to develop appropriate integrated age management strategies that take a life cycle perspective is the Lifelong Employability Assessment tool developed by CSR Europe (Box 1). It takes a human resources management perspective and focuses on possible actions companies can take.

Box 1. Lifelong Employability Assessment (LEA) Tool

Within its project "Rethinking careers" CSR Europe has developed a tool for "lifelong employability assessment" to allow companies to benchmark themselves against other enterprises and against "ideal age management". The tool also provides advice to dozens of companies. The tailored analysis and benchmarking helps to provide companies with answers to the following key questions: How effective are your Human Resources (HR) processes in dealing with longer working lives? Where do you have gaps? How can you improve? How do you perform against peers and best in class?

The tool is based on a work life-cycle perspective. It identifies life-long career requirements in the following areas: life-long learning, work-life balance, age-adapted health and well-being, mobility and non-discrimination. It presents an ideal framework for four areas of HR process:

(1) Strategic workforce planning is a part of the human resources management strategy.

This involves assessing the volume and structure of the workforce on a yearly basis and carrying out a medium to long-term projection. Special attention is paid to older employees in order to provide alternative solutions internally (acquisition of new skills, functional mobility) or externally (outplacement, entrepreneurship).

(2) Knowledge and career management necessitates an intensive dialogue with the line manager. A tailored view of personal and professional development is integrated into career development schemes. This includes life-long and age-adapted learning for sound knowledge and skills development per life-stage, as well as salaries based on performance rather than solely on seniority

(3) Workplace adaptation measures cover all dimensions of ergonomics: physical, cognitive, organisational, and environmental. The objective is to adapt the workplace design and working conditions to the constraints of age.

(4) Mobility and flexibility is promoted across the company's wider network (including other companies, institutions, NGOs, suppliers). Functional mobility is increased both inside and outside the group or network. This includes secondments, outplacement and sharing expertise as well as entrepreneurial skills development tools.

About 21 criteria have been defined within these four HR process areas. Scores are given by managers to the different indicators. The results are then presented by benchmarking the overall score against peers and average, score per criteria, score per HR process area, against best in class and average.

Results compiled from interviews conducted in 2013 with 13 managers in 11 companies show that on average companies achieved only 42% readiness for lifelong employability. The best in class reached 65% readiness and the lowest in class only 28%. The main weaknesses identified concern: skills/competency transfer and development; mid-career plans and career development schemes; training; salary compensation; internal mobility; volunteering during employment; networking for employees; functional mobility; volunteering after employment; and entrepreneurship. Companies showed better results with regard to workforce planning processes and workplace adaptation.

For the dissemination of the approach CSR Europe relies on 41 National Partner Organisations and 64 corporate members, catalysing change through their affiliates and sector associations.

Source : CSR Europe 2014

Understanding the demographic issue at company level and at sector level

Tools for a "demography check" or an "age structure analysis" have been developed in different countries, e.g. in Switzerland (Box 2). The result of the age structure analysis gives an indication of future labour demand. The consequences for human resources policies can be manifold: recognising that it is necessary for the company to keep older workers in work as long as possible or recruit a younger workforce in order to get a more balanced age mix of staff. Box 2 gives an example of tools for assessing the "demography fitness" of a company.

Box 2. The Prime Time Project in Switzerland

Several tools were implemented in six participating companies as part of the "Prime Time" project carried out by the University of Applied Science of North-West Switzerland. In the first phase of the project a kick-off meeting with the company took place, an age structure analysis was made and a self-assessment tool was implemented. This consisted of a questionnaire on age-related issues based on indicators to be answered by the company on the basis of documentary analysis and administrative data (Age-R-profile). On this basis in-depth interviews were conducted and a result and strategy workshop carried out. In the second part of the project, managers were asked to fill in a diary about their behaviour towards older staff and to reflect on their own age. On the basis of these results in-depth interviews were conducted and workshops with managers were organised. Finally, line managers underwent training. In the final phase the project was evaluated.

Source : Zölch et al. 2009

At national, regional and sector levels forecasting models for skills development have been elaborated to take into account demographic development. Tools have been developed to estimate the age structure related replacement demand. Replacement demand is one element of wider macro skills forecasting projects combining replacement and expansion demand on the demand side of the labour market (see e.g. Cedefop 2012 and Vogler-Ludwig, Düll, Kriechel 2015 for Germany). An example of a sector level forecast is a replacement demand analysis that has been carried out for the metal industry in the Netherlands, based on the labour market monitoring system that has been developed by the Dutch Research Centre for Education and the Labour Market (ROA) since 2003 (Kriechel 2013). The labour market monitoring system was deemed necessary as the sector anticipated, even in the early 2000s, that the ageing of the workforce and the short supply of technically trained (young) workers would lead to future challenges in fulfilling its specific skill needs. Various information sources were used to monitor the sector since its establishment. A survey of firms provided insights into their individual HR management strategies and developments, administrative data from pension funds was used to identify the specific age and gender structure of the sector, and the labour force survey and national skills forecast provided the necessary background information to analyse and interpret the information. In addition, frequent company visits were organised and qualitative interviews conducted with the personnel managers of the firms. This approach has led to a better understanding and agreement on activities that firms and sectors can undertake.

Providing advice in the area of age management in particular for SMEs

Providing SMEs with consultancy services in the area of age management goes back at least to the early 2000s in the case of Europe. A project was initiated in Finland in the year 2000 to provide advice on age management. The "Carrot" project focused on age management in SMEs. The project ran from 2000 to 2003 and was part of the Finnish National Programme for Ageing Workers. Twenty SMEs from the industrial, service and cultural sectors participated in the "Carrot" project. It aimed at establishing permanent good practice in SMEs and spreading the message to other SMEs via publicity and networking. The companies were thoroughly analysed in terms of workplace development and health and safety issues,

comprehensive feedback was given, and new plans to address company needs were drawn up. The companies conducted the projects on their own terms and with expert help. The results were very encouraging. Sustainable new practices were established in over half the participating companies and the project was very well received both by managers and staff (Lindley at al. 2006; Duell et al. 2009).

In other countries key stakeholders have, more recently, started initiatives to provide advice to companies and in particular to SMEs. An interesting approach can be found in Germany, where the Public Pension Institutions implemented the pilot project « GeniAL » (*Generationanemanagement im Arbeitsleben*, generation management in the working life) from 2008 to 2011 (Deutsche Rentenversicherung Bund, 2011). The aim was to provide advice services, in particular to SMEs. In the Land of North-Rhine Westphalia in Germany a pilot project *AGE-Management* has been launched to implement age management strategies in 12 SMEs. The initiative brings together companies of all sizes, experts, occupational associations, health care and insurance institutions[3].

A recent example of a project aimed at helping companies to develop age management strategies is the "Best Agers Lighthouse" project implemented in the Baltic Sea region (see Box 3).

Box 3. Best Agers Lighthouse Project in the Baltic Sea Region

This transnational project, running from 2013 to 2014, was funded by the Interreg Baltic Sea Region Programme and was led by the Academy of Economics Schleswig-Holstein, Germany, gathering 12 partners from Germany, Poland, Latvia, Lithuania, Finland and Sweden. It was an extension of an earlier project "Best Agers" (2010-2012) funded under the same programme. The project conducted age management interventions in selected companies and public organisations in the participating countries. In each organisation, an external advisor teamed up with an internal mentor from the organisation's staff to analyse the current and expected staff situation and design and implement appropriate age management measures for the organisation. These interventions were accompanied by research activities to assess their effects on the organisation.

As a starting point, a study of employer perceptions and the prevalence of age management strategies was conducted in the County of Pinneberg in Germany along with Sweden, Lithuania and Latvia. The results indicated that there was awareness about demographic change and employers had a positive attitude towards older employees' skills, however, three-quarters of companies had no long-term personnel planning in place and a very few companies used age management practices.

Advice and support was given to human resources managers and internal mentors based on analysis of the company's age situation. Interviews with managers and employee questionnaires helped to shape the interactive advice. Advice was given to the top-level management on key measures such as career talks with employees, adjustment of tasks, flexible working arrangements, qualifications, and intergenerational teams.

Following the project, managers' views still varied, however, on the positive side, their attitudes towards age in relation to the recruitment and termination of contracts had improved. Managers tended to see more value in the skills of older employees and perceived the benefit of competence transfer. It was crucial to show the cost-benefit relationship to companies (e.g. productivity gain needs to offset the intervention costs of age management). Employees had an increased sensitivity towards age issues in the company, raising appreciation as well as expectations. The project showed the benefits of giving external advice to employers who don't have enough resources internally.

Source : http:/www.best-agers-lighthouses.eu

[3] http://demographie-wiki.de/index.php?title=AGE-Management

Including age management issues in collective bargaining

A way to promote the implementation of age management in companies is to fix age management as a collective bargaining issue. In this way, employee and employer concerns can be tackled at the same time. Furthermore, it may oblige more companies to consider appropriate age management strategies. However, the practice varies significantly across countries. While in countries like Norway integrating age management issues into collective agreements is quite advanced (see below), this is not the case in countries like Italy (according to a survey conducted by ISFOL[4]). In France, the government passed a law to oblige companies to develop an age management action plan or to conclude collective agreements at the sector or enterprise level in order to keep older workers in employment. Issues to be tackled refer to recruitment, career development, working conditions, training, knowledge-transfer and mentoring. However, the implementation of age management measures remains weak (OECD 2014b, Defrenes et al. 2010).

In Norway, a tripartite co-operation has been institutionalised (OECD 2013b). Norway's Inclusive Workplace Agreement (IA Agreement) is a central framework for tripartite co-operation between social partners and the government. It was launched in 2001 and renegotiated in 2010 for the period 2010-2013. The three goals of the Agreement are: i) a 20% reduction in sick leave; ii) increased employment of people with reduced functional ability; and iii) extending the effective labour force exit age for an employee aged 50 by six months compared with 2009. In 2012, 58.4% of Norwegian employees worked in firms with an IA Agreement. One aim of the IA Agreement is to find individual solutions. Since the first IA Agreement was signed in 2001, the Norwegian government and the social partners have encouraged companies to develop a more senior-friendly policy and implement special measures to retain older workers. Examples of such senior measures are flexible working hours, partial retirement, and reduced working hours with or without wage compensation. Research has, however, found that the initiatives most commonly offered by Norwegian firms often have the feature of providing benefits (so-called "gifts") for older workers who would have continued working anyway. The OECD (2013b) therefore recommended that the initiatives and instruments contained in senior policies need to be differentiated across occupations, sectors and industries, and implemented as part of a preventive approach. For the effective development and implementation of the agreements, the roles and attitudes of the local social partner representatives are crucial. The *Centre for Senior Policy*, a tripartite institution, carries out research, is active in awareness raising and provides support in the context of IA agreements at all levels, including at the local level (European Commission 2012).

The contents of the collective agreements taking age-related issues into account vary significantly by sector. Two interesting practices at sector level are presented in the following:

- The collective agreement for the construction industry in Switzerland foresees arrangements for early retirement, however, at a higher age than the usual exit age in the sector. This motivates workers to stay for longer and employers have also been improving working conditions (OECD 2014a).

- Another example is a collective agreement "lifelong working time and demography" signed in the German chemical industry in 2008. Elements of the collective agreement addressed further training, the development of competences, work organisation and lifelong working time models. The agreement obliged all companies to carry out an age structure analysis as a starting point for the development of demography concepts in their enterprises. A further element consisted of the establishment of a demography fund (300 EUR per staff member per year) in order to finance

[4] Preliminary results of the ISFOL survey were presented at the OECD LEED Expert Roundtable 31 March 2015

measures such as gradual retirement schemes. The use of this fund along with the implementation of measures related to work organisation, health, further training and work-life balance needed to be negotiated at the enterprise and workplace level by the works councils. In the same sector, the pilot project "deci" was initiated under the national "new quality of work" initiative, INQA (Initiative Neue Qualität der Arbeit) and was implemented in six companies with the aim of elaborating transferable age management strategies. A particular feature of these pilot projects was the involvement of social partners and staff. The project got support through related research activities. Dissemination of results and the establishment of guidelines, including guidelines on the social dialogue, resulted from this project (Bundesamt für Arbeitsschutz und Arbeitsmedizin and INQA, 2011; Latniak et al. 2010).

Regional networks for raising awareness

In order to raise awareness of age management issues at the local and sector levels, social partners and Ministries have issued guidelines on dealing with age related issues and developing age management approaches in a number of countries (see e.g. in the UK by TAEN 2007). In the case of Germany, the INQA initiative launched in 2002 brings various actors together, including the Federal Government, the *Länder* (regional) governments, social partners and social security institutions. In the context of this initiative good practice examples are collated at company level.[5] Furthermore, research is conducted, guidelines elaborated and demography-experts trained (*Demographie-Lotsen*) to provide advice to SMEs. In addition, local networks for the promotion of age management have been established in Germany[6], France and other countries.

In Australia, the Mature Age Workplace Strategy was launched in 2008 and is aimed at employers. It has three components - The Wise Workforce Programme, the Jobwise Website and the Mature Age Employment Practical Guide. Under the Wise Workforce Programme workshops have been established at regional level to raise awareness among employers, particularly SMEs, of demographic changes affecting labour supply. The workshops aim to provide employers with practical tools and networks to assist them in implementing workplace policies and practices to attract and retain experienced workers including mature workers. Jobwise Outreach and Wise Workforce are delivered in ten specified regions each year (Barnett et al 2008).

One common activity for raising awareness at national, regional and local levels is the granting of awards or prizes for the implementation of age management strategies (European Employment Observatory 2012 and OECD 2014b). For example, in the US the AARP foundation that is concerned with the living situation of Americans over 50 grants the AARP Best Employers for Workers Over 50 award, co-sponsored by the Society for Human Resource Management, a biennial programme that recognises employers with exemplary practices for recruiting and retaining mature workers.[7] Another example is Japan, where the Ministry of Economy, Trade and Industry (2013) recognises 100 companies implementing diversity management, including many examples of age management.

[5] http://www.inqa.de/DE/Lernen-Gute-Praxis/Top-100-Gute-Unternehmenspraxis/Chancengleichheit-Diversity/Zellstoffwerk-Stendal-Pflegen-und-Arbeiten.html

[6] www.demographie-netzwerk.de

[7] http://www.aarp.org/work/employee-benefits/best_employers/

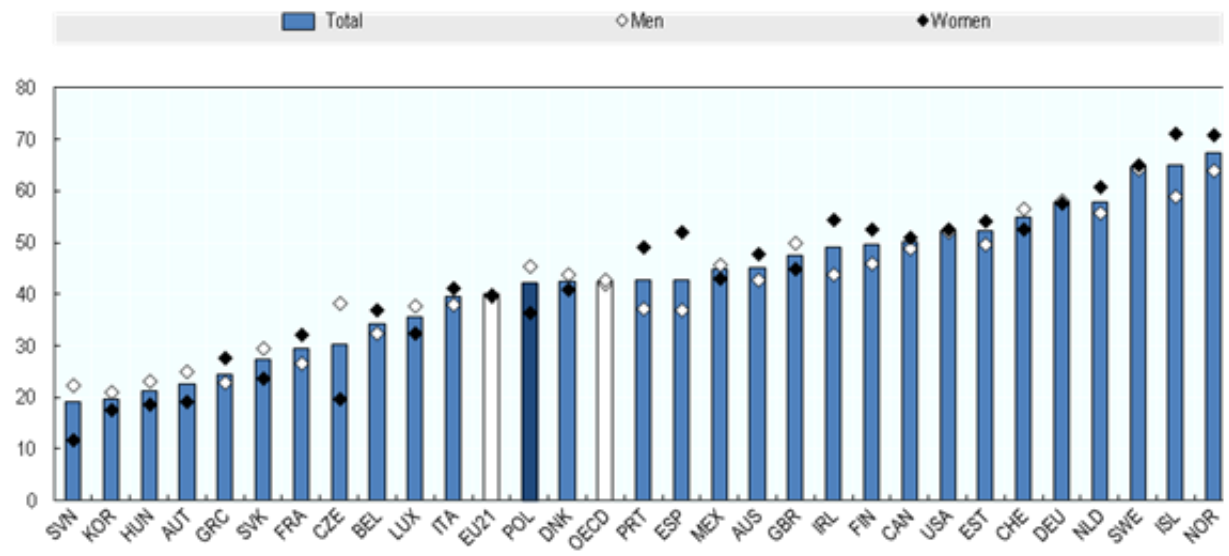
Conclusion

It is widely acknowledged that the implementation of age management strategies is essential for productivity gains of older workers. Although the main approaches are well known, implementation, in particular within SMEs, could be substantially improved. The perceived “knowing-doing gap” is the result of a number of factors, and improved guidance for companies to help them develop age management strategies adapted to their specific situations is one essential way to promote the implementation of age management strategies. A number of tools have therefore been elaborated by different actors, including social partners, national and regional governments, universities and other relevant institutions. Implementing age management approaches by introducing them in collective bargaining agendas seems a promising way forward. The provision of (personalised) guidance to companies, particularly SMEs, should be pursued along with measures to raise awareness of age management related issues.

ORGANISING WORK AND DEVELOPING APPROPRIATE WORKING CULTURES WITHIN THE ENTERPRISE

Increases in employment rates have mainly been achieved through retaining older workers longer in employment (Figure 2). In countries with high employment rates of older workers (Figure 1), retention rates tend to be high.

Figure 2. Retention rate after the age of 60, by gender, OECD countries, 2013



Note: The retention rate is calculated as employees aged 60-64 with tenure of five years or more as a percentage of total employees aged 55-59 five years before.

Source: OECD based on OECD estimates, based on national labour force survey. OECD 2015a

Companies in countries with high retention rates of older workers are more likely to have developed age management approaches. High retention rates themselves can be for various reasons, such as institutional factors that make the dismissal of older workers expensive or restrict early retirement. Another reason can be skills shortages. In both cases, there is pressure on companies to increase the productivity of older workers. However, research indicates that even in countries with high retention rates there is room for improvement.

Encompassing age management approaches

Good practices in age management take a life-cycle approach and encompass a variety of interventions, including work organisation, health, career development, training, and working hours (for an overview of company case studies see e.g. Lindley et al 2006, Walker 2001, Taylor 2006, Naegele and Walker 2006, Zölch et al. 2009, North, Hershfield 2014, the Sloane Center for Aging and Work 2012, Ministry of Economy, Trade and Industry of Japan 2013). The benefits of age management strategies have been documented more recently by case studies prepared by Cedefop (2015).

Many of the so-called “holistic” age management strategies were based on the workability approach, linking quality of work aspects and productivity (see section 2). Combining measures in the different areas

(work organisation, working hours organisation, health measures, training etc.) would represent the ideal approach. However, companies often focus on only a few measures and only a small number of companies, mainly large companies, have developed more encompassing approaches.

Promoting flexibility and mobility

Case studies clearly indicate that mobility and flexibility are key elements of a holistic and life-cycle-based approach to age management. In the US, the Sloane Center for Aging & Work (2012) has a long list of recommendations for the development of comprehensive age management policies and new workplace cultures, with an emphasis on flexibility aspects: ensure a broad access to a variety of workplace flexibility options; ensure supervisor support for workplace flexibility; ensure work team support for workplace flexibility; develop a positive culture on the job surrounding work life and family/personal life; assess the flexibility and career needs of older workers through surveys, focus groups, and interviews with employees and managers; create a multidisciplinary task force; and evaluate how the organisation might use flexibility to recruit older workers, engage retirees as mentors, fill part-time or seasonal positions, or provide specialised expertise.

The flexibility approach is in line with the observed individualisation process in human resources management (Lindley et al. 2006). Age management strategies are often implemented through individual guidance: this encompasses health check-ups and the search for the optimal task or assignment with regards to health-related issues as well as development interviews with the worker in order to establish individualised career and training plans. These individualised approaches respond to the fact that "work ability" differences between individuals increase with age; there is no prototype of an "older worker".

Increasing internal mobility within the company or enhancing job flexibility is a particularly important element of a strategy towards active ageing as it combines life-time employment and the retention of older workers, while, at the same time, responding to employers' flexibility requirements and the need to make the best use of the capabilities of each worker. Literature provides some evidence that occupational mobility is an important factor in preventing problems in the performance of older workers (Gelderblom; 2005; Gelderblom and de Koning, 1992; Thijssen, 1996 for the Netherlands). One explanation is that if older workers are not mobile and keep on doing the same type of work, there is a tendency that they become increasingly specialised in a narrower field. Thijssen (1996) refers to this as "experience concentration". Occupational mobility is high among younger age groups but low for older age groups, as evidence for Germany indicates (Vogler-Ludwig, Düll 2013). There is a danger labour market dynamics are hampered by an ageing workforce.

Re-organisation of work and task allocation

Re-organising work in order to minimise the negative effect of reduced productivity, distribute workload and time pressure or maximise the benefits of the strengths of older workers includes allocating tasks to older workers in which they have a comparative advantage.

Workers in SMEs often need to have polyvalent skills as they may need to accomplish different types of tasks, which in itself allows for some flexibility in the tasks of the worker. Company case studies show that task rotation is one of the instruments to keep workers motivated (Lindley et al. 2006).

A good practice example collected by the Japanese Ministry of the Economy shows that there is evidence that companies may even adapt their business model to the skills of an ageing workforce. As part of their re-organisation, an electrical machinery manufacturer developed a new business model in the area of food processing based on the competences of an older workforce (Ministry of Economy, Trade and Industry, 2013).

Adapting workplaces for older workers through the use of technology

Company case studies also show that modern technologies can be used as a substitute to physically demanding work. New technologies can be used to reduce the physical impacts of work. The German Research Foundation has included in its research programme technological solutions or adaptation of technologies to the needs to older workers, e.g. adapting user interfaces.[8]

Mixed age teams

Another strategy involves mixing teams by age to avoid age being perceived as lowering productivity. However, in the case of mixed work teams, working in an environment under difficult conditions and with a reduced capacity of older workers, conflicts may arise between the different age groups (OECD 2014a).

Depending on the type of occupations and tasks, mixed age teams may produce better results. For example, new research indicates that mixed age teams can bring about more new ideas (Packalen, Bhattacharya 2015, with regard to the production of scientific papers). Furthermore, mixed age teams allow for knowledge transfer (see section 5).

Career development and mid-career reviews

The 5th Survey on Working and Living conditions carried out by the European Foundation for the improvement of Living and Working Conditions shows that the proportion of women with poor career advancement prospects rises continuously between the ages of 25 and 55 (reaching nearly 80%) and then stagnates. The career prospects of men show roughly the same pattern, however the sharp decline in career prospects starts later. Differences between men and women regarding career prospects are highest for the age group 45 to 55 (Eurofound 2013).

Good practice company case studies show that mid-career dialogues and mid-career plans are important instruments to motivate older workers and to develop appropriate measures to increase productivity, better adapt the working environment and respond to workers' expectations (Lindley et al, 2006, Walker and Naegele 2006). Increasing career flexibility also includes changing tasks and functions, e.g. moving from a managerial post to an expert status (Höpflinger 2006).

In the UK, the use of mid-career plans around the age of 50, is promoted as part of a pilot project carried out by the National Institute of Adult Continuing Education, involving 18 consultancy companies giving career advice to 2 500 clients of around 50 years old. First evaluations show positive results in terms of maintaining employability.[9]

Cedefop (2015) carried out a study to investigate the effect of providing career guidance to workers. Case studies showed that career guidance stimulates older employees to work on their own employability, learning new skills and transferring expertise, and therefore increases job satisfaction. A further positive effect of guidance activities was reducing negative stereotypes of older employees.

[8] http://www.altersdifferenzierte-arbeitssysteme.de/

[9] For more information see http://www.niace.org.uk/current-work/mid-life-career-review

Working conditions and the ergonomic design of workplaces

The ergonomic design of workplaces is a preventive measure that is necessary for both older and younger workers to enable them to cope with a longer working life. It requires a careful analysis of each workplace, taking into consideration any planned changes in technology and organisation. Occupational health considerations call for the design of workplaces which allow different exposures. Work should allow different postures and body movements, and a change between physical and mental demands.

Among the numerous studies and guidelines on the ergonomic adaptation of workplaces, Fahrion (2013) gives a wide range of examples of ergonomic measures for a "demography related" plan of the factory, including issues of light, decreased vison of older workers, security, accident avoidance, separation of processes which are harmful to health, and avoiding noise. The company provides engineering services to the manufacturing industry, including advice on the design of "age-adapted" factories.

Health management

It is widely acknowledged that health measures are crucial to prevent declining productivity. In addition to the use of technology and ergonomics, other measures concern the promotion of general health-related strategies for all age groups. This also includes following up sickness and absenteeism and detecting early signs of mental illness (see e.g. OECD 2014 a, 2013 b, Lindley et al. 2006, Naegele and Walker 2006). There is also a clear link to policies on working hours (e.g. rest periods etc.).

Increasing the flexibility of working time

The dimensions of increasing the flexibility of working time are manifold:

- Length and organisation of working time to maintain productivity and avoid accidents. For example, in Switzerland survey results from 2006 showed that nearly a third of companies provided longer rest periods for older workers (Höpflinger et al. 2006) and a more recent survey carried out by Trageser et al. in 2012 showed the length and organisation of working time as one of the key instruments used by Swiss companies.

- Reduction of working hours and use of part-time models to respond to the needs and wishes of older workers to slow down their work rhythm. The implementation of this depends largely on the willingness of the worker to accept a lower income. Practice has shown that this happens more often in the context the older worker changing jobs, particularly in the US and Japan. Although part-time work is not the solution for allowing all employees to work longer, the offer of reduced working hours can be the right incentive for some workers if they wish to remain at work. The need for flexible working time arrangements and shorter working hours stems also from the caring obligations of older workers, as they often have to care for their older parents (see e.g. Vlachantoni 2010 for the UK). In addition to awareness raising in companies and the implementation of appropriate working time models, local actors can also be active in ameliorating conditions for the reconciliation of work and family life (e.g. flexible opening hours of elderly care institutions, supply of day care and short-term institutional care for the elderly, etc.) (OECD 2014a).

- Setting incentives for a phased retirement. The possibilities of gradual retirement impact on both the volume and the distribution of working hours among older workers. Attitudes towards phased retirement among employers and among older workers seem to vary from country to country. A few examples are given below:

- Gradual early retirement in Germany has been *de facto* implemented as an early retirement scheme (Duell, Vogler-Luwig 2012).

- The opposite seems to be the case in the UK: flexible working, allowing older workers to work hours which suit them with phased retirement and discretionary work, often enables older workers to remain in employment (Lindley et al. 2006).

- In the US, the 2014 Society for Human Resource Management (SHRM) Employee Benefits Report found that overall, 11% of organisations offered some type of phased retirement: 4% offered a formal phased retirement programme and 9% offered an informal programme (as reported by the Sloan Center for age and work phased retirement factsheet). In the 2014 Transamerica Retirement Survey, just 21% of workers said their employers enabled employees to reduce work hours and shift from full-time to part-time.

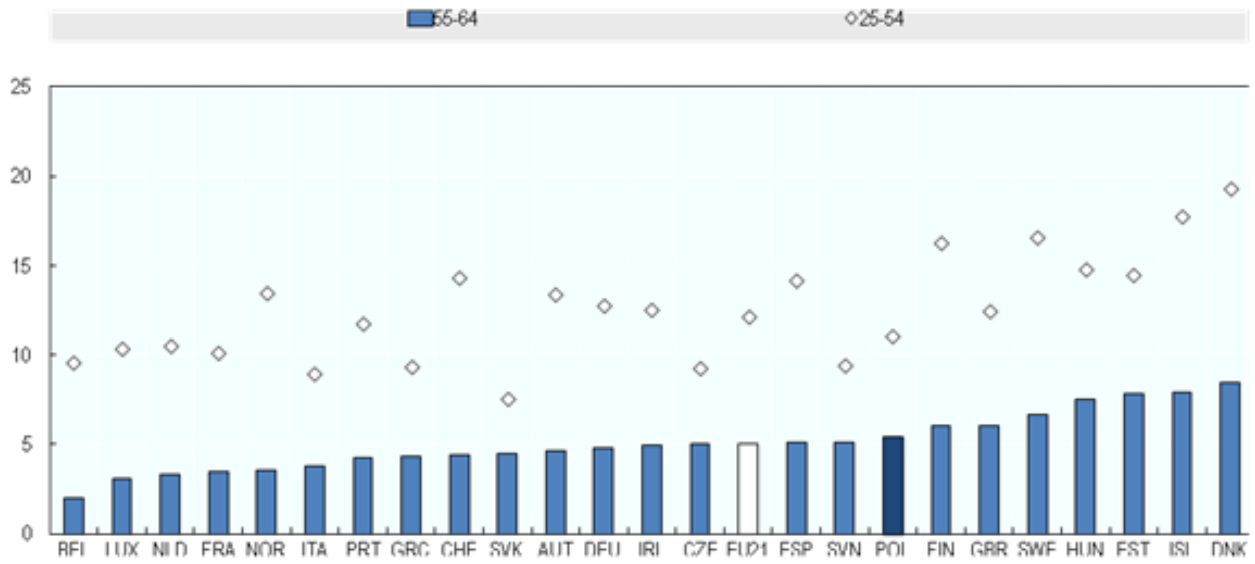
Conclusions

From a lifetime perspective, key elements of age management strategies tackle different dimensions of work. Measures are directed towards both workplaces and workers in order to adapt workplaces to the needs of ageing workers (ergonomics, learning value of tasks), increase the employability of workers (further training, health measures, motivation, satisfaction, breaks, etc.) and reorganise work to make use of the "age-related comparative advantage" (such as experience).

HIRING PRACTICES AND PROMOTING INTER-FIRM MOBILITY

In a large number of countries, hiring rates of older workers are particularly low and there is a significant gap between the hiring rates of younger age groups and older workers (Figure 3).

Figure 3. Hiring rates by age, European countries, 2013, %



Note: The hiring rate is the ratio of all employees aged 55-64 with tenure of less than one year to the total number of employees aged 54-63 the year before.

Source: OECD based on OECD estimates, based on the European Union Labour Force Survey (EU-LFS). OECD 2015a

There are a number of behavioural, economic, demographic and organisational factors that can explain the prevalence of low hiring rates: (i) manager prejudice about the productivity of older workers; (ii) length of on-the-job training needed before a worker becomes fully productive and their expected length of employment; (iii) the perceived cost-benefit relationship of employing older workers; (iv) the age structure of the company, the relationship between the productivity and wages of older workers (cost-benefit perspective, depending on sector and occupation); (v) the overall approach of human resources managers (internal labour markets); and (vi) discouraged older unemployed people who may not apply for a suitable job. This may happen if older workers underestimate their prospects in the labour market (Richert-Kamierska 2013, Fahrion 2015).

In contrast, those companies recruiting older workers see different advantages in doing so: (i) the demand for older workers may result from a market approach, e.g. companies serving older clients; (ii) older workers may have experience and expertise in a given field; (iii) the combination of experience and social skills is needed for managerial tasks (see e.g. Fahrion 2013); (iv) benefits resulting from the positive work culture and work ethics of older workers, e.g. they are perceived as being more reliable; (v) reducing fluctuation, as older workers are less likely to leave their job to pursue a career elsewhere; and (vi) overcoming labour shortages.

The cost-benefit relationship is crucial to the decision to hire older workers. Perceptions play an important role in assessing both costs and benefits. As long as older workers are not hired because of prejudices and discrimination or because of matching inefficiencies, productivity losses will occur. It is therefore important to improve the mobility of older workers within the external labour market.

Approaches that have been developed to improve hiring rates include targeting the behavioural factors of both employers and workers, setting financial incentives, and implementing measures to increase the employability of older workers (training measures are examined in more detail in section 4).

Anti-discrimination practices

Anti-discrimination legislation or directives related to age have now been adopted in nearly all OECD countries. A recent evaluation of the impact of anti-discrimination legislation in the US found that it had a positive effect on the employment of older workers (Neumark and Song, 2013). The effectiveness of anti-discrimination legislation is increased if it is accompanied by awareness raising activities (OECD 2006).

In the US, the Equal Employment Opportunity Commission (EEOC) is concerned with backing the implementation of the Age Discrimination in Employment Act. The Commissioners have held several public meetings to gather testimony from panels of experts on issues such as age-based stereotypes, barriers to hiring older workers, and the effect of the economy on older workers. The Commission also offers "Technical Assistance Programs" to employers, which often include a session on age discrimination. These detailed training programmes are designed to help business owners understand their legal obligations. Additionally, age discrimination was a topic of "customer-specific trainings", which are programmes customised to fit the stakeholders' specific needs. EEOC field offices also conduct less formal outreach in their local communities (OECD 2012).

In Germany, the Federal Ministry of the Economy has published guidelines for the recruitment of older workers (BMWi 2013). The publication gives practical advice and tries to enhance transparency for assessing costs and benefits, by addressing issues like wages, employment contracts, planning, experience, introductory training, need for further training and flexibility. It differentiates between employing older workers, the older unemployed or retirees.

In order to minimise discrimination at pre-selection stage, it is considered good practice to issue job postings without reference to age. In France, a recruitment method "by simulation" was developed by the Public Employment Service, in which the candidate is selected on the grounds of an aptitude test, with no consideration given to age or prior experience (OECD 2014b).

Supporting the older unemployed in their job search

Job seeking support for the older unemployed can be provided by a variety of actors. In addition to those offered by the Public Employment Service, services are also provided by private placement agencies. The main approach on the supply side has been to improve coaching and counselling services and to adapt them to the specific needs of older workers. Different types of local partnerships have been set up to tackle the demand side and to enhance the propensity of employers to hire older workers,. The following examples show different approaches implemented at the local level:

- An interesting approach can be found in Switzerland, where a mentoring project ("Tandem 50+") was initiated by an organisation at regional level (Canton St. Gallen) in 2008. The organisation looks to find mentors in enterprises who are themselves over 60 and who are willing to take up a mentor role for older jobseekers. In co-operation with the local Public Employment Service a selection is made from the older unemployed, who need to have high motivation and show good

employability. Placement results are promising, but no evaluation of the approach has yet been made. The limitation of the approach lies in its creaming effect, as highly motivated and healthy older jobseekers are selected for participation in the programme (OECD 2014a).

- The age network of the European Social Fund (ESF) has highlighted as good practice the Belgian practice of compulsory outplacement services following dismissals. Belgian employers are required by law to provide outplacement services for dismissed employees who are 45 years old and above. In cases of collective dismissals, they must offer outplacements to all employees affected, regardless of their age. Outplacement services, as well as employment incentives, are financed through central government budget and in some regions additional funding from a Social Intervention Fund, as is the case in the Flanders region.[10] In this region, private sector agencies are the key providers of outplacement services. Face-to-face support is the main element of the outplacement services and includes psychological support; the assessment of competencies, motivation, interests, the establishment of career vision and draft CV; the assessment of training needs; the setting-up of action plans consisting of the use of job advertisements and open applications, intermediaries of the job market, activating and optimising the network etc. The services also help to improve access to information and widen the knowledge base e.g. through market analysis and job scanning per region and sector and giving access to detailed salary surveys.

- The need for intensive and age-related advice for older jobseekers is evident in Switzerland, where intensive counselling for older workers is provided in different Cantons. An evaluation of a pilot project by the Public Employment Service in the Canton of Argovia has shown a positive impact on placements for 45 to 55 year olds (Arni 2012). Interestingly, this study also revealed that the advisors and beneficiaries were initially both, on average, overly optimistic about the chances of a prompt return to work, as unemployment is low. The beneficiaries themselves are not very realistic in their salary expectations. At the same time, older unemployed people have low self-confidence. Counselling needs to address these contradictions.

- Also in Germany, a greater emphasis has been placed on intensive counselling for the older unemployed under the "Perspektive 50plus- employment pacts for older workers in the regions" programme. It was launched by the Federal Ministry of Labour and Social Affairs in 2005 and will be terminated in 2015. About 78 regional employment pacts have been set up, including as partners nearly all Jobcentres as well as a wide range of local stakeholders and key actors such as companies, chambers and various associations, trade-unions, municipalities, training institutions, churches and social service providers (Duell, Vogler-Ludwig 2012). Implemented measures include, coaching, profiling, training in communication skills and job application training, further training, internships and wage subsidies. Early evaluation of the first phase of the programme, conducted in 2007, showed that the success of the programme rested on the combination of individualised counselling and coaching as well as the proactive and targeted outreaching of employers. The quality of the pre-selection of candidates for vacancies was highly valued by small enterprises. The most recent evaluation of the programme showed that placement results were better than in the case of more traditional approaches with less intensive counselling but more active labour market measures (Knuth et al. 2014). However, there are two limitations as regards the effectiveness of the programme: the average age of those unemployed activated and placed was relatively young (around 54 years of age with a peak at 51 years), while the share of people aged 60 years and above represented only 3% of all participants placed on the regular

[10] http://www.careerandage.eu/prevsite/network-products/belgium/job-job-transitions/programmes/outplacement-flanders

labour market; and the programme did not sufficiently meet its objective to raise awareness (Büttner et al. 2008).

- Co-operation between different partners at local level has been the choice of outplacement services in the French-speaking region of Wallonia in Belgium. Here, the approach is to provide in-house outplacement support to employees in Reconversion Units. These are temporary, but officially recognised, outplacement units formed when redundancies are announced. Each unit, where unions, the Public Employment Service, and sector organisations work in partnership, is created specifically to provide support to workers laid off by a particular organisation.

- Another example of co-operation at the local level are the mobility centres established in the Netherlands in 2009. A regional network of 33 mobility centres covering the entire country was established in partnership with employers, local government and training bodies. The mobility centre approach was to contact, as soon as possible, organisations that had announced they were laying off staff to enable them to provide tailored support to their employees to help them find new jobs. Additionally, mobility centres offered advice on skills and training to companies who wanted to retain skilled and experienced staff but who, as a result of a temporary shortfall in their order books, were offering their employees part-time unemployment or a reduction in working hours. The budget came mainly from Public Employment Centres. Additional financial support, mainly for specific projects and support measures, was obtained from a variety of other bodies, including employers, regional authorities, training funds, the Part-time Unemployment Act funds, and the European Social Fund.[11]

Employment incentives for hiring older workers

In a number of countries, companies can get employment incentives for a limited period of time when employing an older worker. Wage subsidies and other employment incentives aim to overcome the (perceived) initial negative productivity-cost relationship when employing older workers (for an overview see OECD 2014a). For example, in the Netherlands social security contributions can be reduced by 7 000 EUR per year when recruiting a worker aged 50 or above (OECD 2014c). This amount is reduced in cases where working time equals less than 36 hours per week. In Poland, social security contributions can be reimbursed and wages subsidised up to 80% of the minimum wage for employing older workers (over 50 years old) who are eligible to early retirement, and up to 50% for older workers who are not eligible to early retirement.

Conclusions

In order to increase the hiring rates of older workers it is necessary to reduce discrimination in recruitment processes at company level. Anti-discrimination legislation and anonymised recruitment procedures need to be implemented along with awareness raising measures and training for (human resources) managers to make the benefits of employing older workers more transparent. Public Employment Services can play an important role in coaching and guiding older job seekers as well as in improving their employability through active labour market programmes.

[11] http://www.careerandage.eu/prevsite/network-products/netherlands/job-job-transitions/programmes/regional-mobility-centres

TRAINING AND SKILLS DEVELOPMENT OPPORTUNITIES FOR OLDER WORKERS

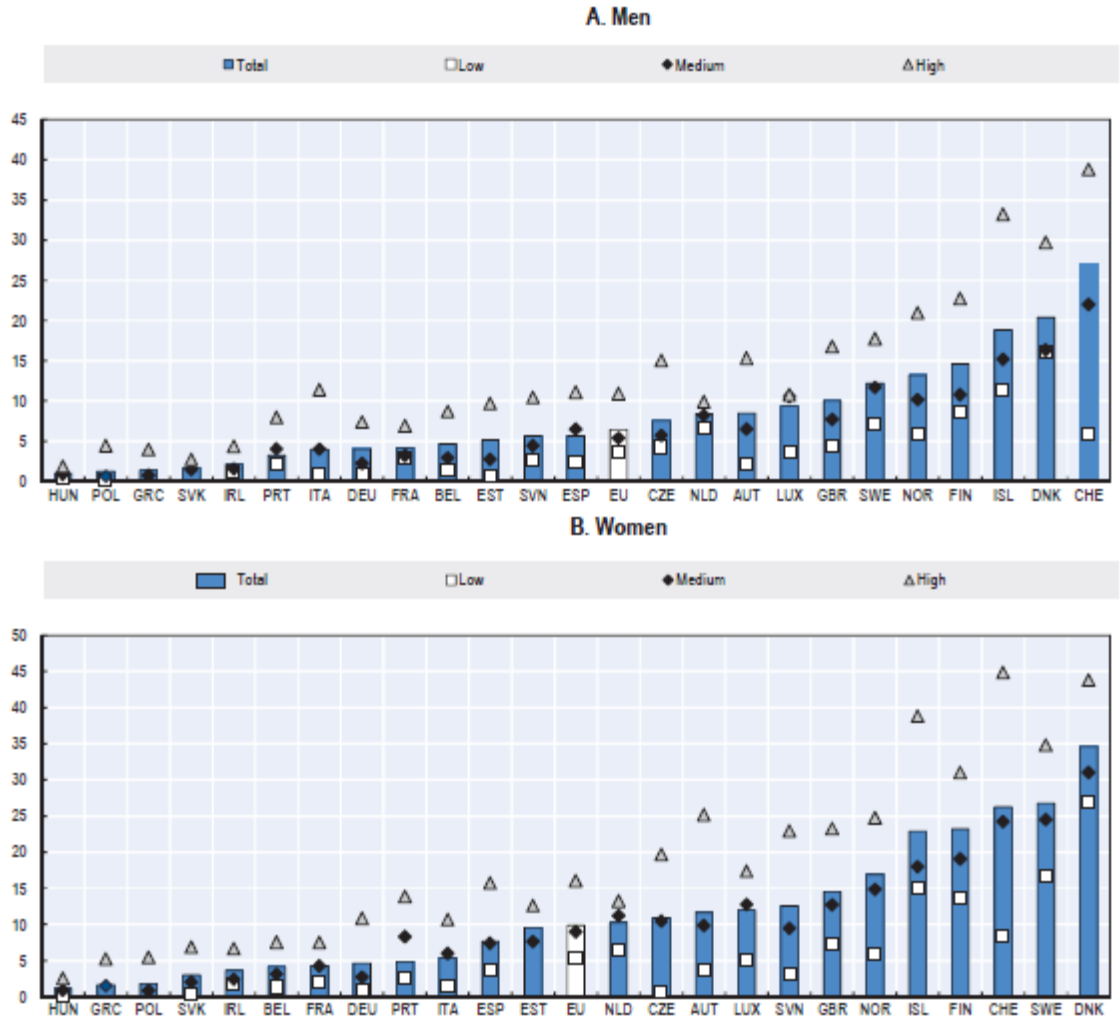
A key factor for increasing the productivity of older workers relies on using their strengths in terms of skills and competences and developing their skills. Continuing training in general can temper any tendency to become less flexible as well as increase the capacity to deal with technological change.

In general terms, the simplified view that older workers are less competent and that their skills are dated has been partly disproved by research. The "deficit model" was developed after psychological surveys in the 1970s and was based on intelligence tests, where younger people achieved better results than older ones. However, the interpretation of the data leading to the "deficit model" neglected to account for different levels of education and led to the misconception that mental decrease is a consequence of ageing. Research shows that although skill gaps exist, the learning capacities of older workers are not necessarily inferior to those of younger workers. The large differences in the participation rates of older workers in workplace related education indicates that continuous learning is not simply an age related matter. Indeed, the importance of learning trajectories is widely acknowledged in relevant literature (for an overview see Lindley et al. 2006 and Lugen and Mulder 2010). According to results of the Programme for the International Assessment of Adult Competencies (PIAAC) survey on adult skills, conducted by the OECD in 24 countries, countries showing higher levels of participation in organised adult learning activities also demonstrate higher literacy and numeracy skills (OECD 2013c). The findings show that participation in continuous learning depends heavily on the initial qualification level. Furthermore, workers with a low qualification level and who have not benefited from continuous training to help stabilise their cognitive skills, are most vulnerable to technological change.

The following figure shows that the participation rate of older workers in work-related training varies significantly between countries. In Switzerland and a number of northern European countries, older workers are more likely to participate in further training (Figure 4). These countries also have higher employment rates of older workers. However, in all countries the lower educated participate less.

Figure 4. Work-related training in the 55-64 age group by gender and education level, European countries, 2012

Percentage of workers in the age group 55-64



Note: Low = below upper secondary level education; Medium = upper secondary level; High = tertiary level.

Source: OECD estimates, based on the European Union Labour Force Survey (EU-LFS); OECD 2015a

Upskilling low skilled older workers

From a life-cycle point of view, further training should take place at all ages. The learning capacities and willingness of older workers are higher if they have been used to learning throughout their whole working lives. Companies are more reluctant to invest in further training when workers are low skilled.

A good practice example of a programme to promote the upskilling of older workers with low skills levels is the German programme WeGebAU, financed by the Ministry of Labour and managed by the Public Employment Service (Box 4).

Box 4. Programme for upskilling low-skilled older workers in Germany

In 2006, the German PES started a new programme "WeGebAU" (Weiterbildung geringqualifizierter und beschäftigter älterer Arbeitnehmer im Unternehmen) to promote further training within companies for the low skilled and for workers aged 45 years and over. This was refocused in 2007 on the participation of employed people only. Wages or training costs can be subsidised under the programme. In 2010 about half of companies were aware of this programme, but only a quarter took advantage of it. Since its introduction, take-up has somewhat improved for larger and medium-sized companies. Smaller companies remain more difficult to engage in terms of investing in company-based further training. Companies reported the main reason for not engaging with the programme was the lack of requirement for additional further training. This was particularly the case for small companies (80% of respondents) (Lott, Spitznagel 2010). Only about one in ten companies stated that the low interest of employees prevented them from taking advantage of the programme. Working organisation represented a barrier for a sixth of companies. As expected, the interest in the programme was higher for expanding companies. This might indicate that predicted labour and skills forecasts are likely to boost the incentive for companies to invest in further training. Those companies who used the measure assessed the results positively. Take-up of the programme has improved in recent times. In 2013, there were nearly 10 000 participants (Bundesagentur für Arbeit 2013a). Nearly half of them participated in vocational training leading to a recognised occupation. From 2012 to 2014 it was also possible for people younger than 45 years to participate (Bundesagentur für Arbeit 2013a). A recent evaluation carried out by the IAB indicates that participation leads to improved job stability and survival in employment (Singer, Toomet 2013).

One local PES in Germany (Agentur Neumünster) used the programme to train elderly care nurses, for whom there is a labour shortage. From 174 new participants in 2014, about 80 were trained in this profession (initial training and further training). According to the local PES, companies value the measure positively. Success factors include reduced initial training period (in the case of nurses for elderly care) as well as counselling and advice provided by the PES.

Source: Duell, forthcoming, Up-skilling adults. Germany, EEPO Spring Review 2015, information provided by the PES Neumünster

Developing age-related learning settings

More and more research is now conducted on developing "age-related learning settings". Research has indeed uncovered different types of skills which vary with age.

- *Experienced-based and tacit knowledge*: Older workers have access to so-called tacit knowledge i.e. technical know-how and cognitive knowledge on the one hand, and understanding on the other. Long-term work experience can improve a person's strategic thinking, intelligence, consideration and wisdom (Lindley et al. 2006). According to case studies carried out in the Australian manufacturing industry, mature workers are valued for their ability to adapt to change more readily because of their wider life experience and broader understanding of an organisation's purpose (Smith et al 2007).

- *Skills to manage uncertain work situations:* Mature employees are able to handle uncertain work situations more successfully because of their tacit and experience-based knowledge. Furthermore, they are more able to convert their knowledge into strategies (Tikkanen *et al*., 2002; Krenn & Oehlke, 2001; Hörwick, 2003, Heidling et al. 2015).

- *Social skills:* Good social skills and mental maturity are generally positively correlated with age.

Empirical evidence on the required format of training for older workers paints a mixed picture. It can be assumed that differences by sector, occupation and the learning biography, i.e individual pathways to formal and informal learning, play an important role. Mature learners are a heterogeneous group.

According to case studies carried out in the Australian manufacturing industry, mature workers often prefer training to be workplace-based and practical rather than classroom-based and theoretical (Smith et al. 2007). They also tend to prefer training to be task-related and not necessarily lead to a qualification. They are more anxious than younger learners about being assessed, and may be shy in in-class discussions. Much of the upskilling of existing workers in Australia, and therefore of mature workers, is carried out through informal and incidental means. Informal learning is critical to the successful upskilling of mature workers. The spread of nationally recognised training in Australian enterprises in recent years has opened up new formal training opportunities for mature workers and has been important in redressing the imbalance of training and education opportunities in the workforce (Smith et al. 2007).

A study on learning behaviour and the need for age-related learning settings for older workers in the public administration in Germany showed that older workers have quite heterogeneous preference with regard to their preferred learning setting (trainer centred and classroom learning; feedback and exchange based learning; practice and workplace-related learning in laboratories etc.; self-learning methods). A few general observations could nevertheless be made, relating to a higher degree of autonomy for older learners, the value of feedback, clear benefits, learning sessions not too long in duration etc. (Korge, Pile).

Companies have to rely on both formal and informal learning. Both areas are gaining in importance in the knowledge economy. Key issues are: formalising learning to make the impact of learning more visible and skills more tradable, linking formal education and training to workplace related knowledge and skills, and making workplaces more conducive to learning.

The following example shows how learning and future employability of older workers can be based on tacit knowledge and how this knowledge can be formalised so that it can be transferred (Box 5).

Box 5. Developing skills and improving work organisation in the clothing, footwear and textile sector in the Veneto region

The sector is characterised by a strong presence of family-run businesses. The proportion of workers aged 45-55 is high; these workers typically have a low educational attainment but a long length of service and wealth of experience. There is a shortage of skilled manpower in the local/regional labour market and only a few young people are willing to work in this field.

There is an assumption that these workers hold the core competences as “tacit skills”. The skills needed are linked to the manufacturing of the product, which are based on technical ability. A weakness of the companies is the absence of a knowledge management system. There is a tendency to concentrate strategic skills on the experience of the individual.

In the context of some ESF-funded projects (at first “Flexibly Beyhond in 2008" under Innovative actions programmes of Art. 6 European Social Fund), experimental models and tools have been developed to help keep older workers in employment. More specifically, the aim of the projects is to test innovative models of business organisation in order to convey cultural changes in the business environment, extend working lives, and experiment with models for the intergenerational transfer of skills and competences. Project partners include different universities and training centres, sector organisations and trade unions.

The intervention model starts with analysis of the production process, the specific job position, a collection of tacit skills from individual workers through videos, the establishment of a map of relationships and a map of the decision

making process, and stock taking of the perceptions and experience of the section head. Based on this, a skills inventory of professional profiles is made. This helps to implement training of the younger employees and re-training of older employers to promote multi-tasking and polyvalence of job profiles at the enterprise level. Polytechnic training institutions and higher technical schools can base their vocational training on the findings.

So far the project has achieved the following:

-Training of trainers and "side by side training laboratories" to train older workers to become mentors for apprentices and newly hired workers.

-The introduction of inter-generational and semi-autonomous working groups, requiring multi-tasking

-Job organisation laboratories providing business advice to redefine the job roles of older workers and to promote flexible work-life balance models (working time accounts, "menu" time table, annual contracts for older workers after retirement)

Source: Berdicchia, 2008, Fornaserio et al. 2009, Roberta Fefè, Pietro Checcucci, Regional actions for older workers in the Veneto region. OECD LEED Expert roundtable on local economic strategies for ageing labour markets, 31 March 2015

Developing a learning culture in the companies

A recent study on practices in SMEs in Canada shows that companies are becoming increasingly aware of the need to transfer their corporate knowledge, introduce workplace-related learning programmes to facilitate cultural change in the organisation and become more creative and innovative. Programmes include lunch-and-learn sessions, external courses and on-going peer mentoring. Other SMEs perceive the need to foster a workplace culture of learning as a step towards developing the technical skills they require. They have found that learners need the literacy, communication and other essential skills to be able to retain learning and apply it. Those SMEs that face skills shortages in the local labour market also have an incentive to develop the skills they need within the workforce (Centre for Workplace skills, 2011).

Research points to the impact of the work organisation on the learning potentials of the workplace (for a literature review see e.g. Vaughan 2008, Luger and Mulder 2010). According to a study prepared for the ILO (2002) the growth of high-performance work organisations promotes workplace learning.

Multi-skilling and the use of self-managed work groups have a positive impact on workplace related learning (CEDEFOP 2010). Furthermore, the learning environment varies with the type of tasks and with the type of work organisation (Hübner *et al*., 2003, Tikkanen, 2002 and ILO, 2002). Basically, it is argued that "Tayloristic" forms of work organisation diminish the learning capacities of workers and offer few learning opportunities. On the other hand, performance improves when it is combined with increasing demands on responsibility and an ability to concentrate (Hörwick, 2003). Research in the area of industrial sociology and training further shows that workplace related and experienced-based learning is important (Meil *et al*., 2004). However, workplaces also have limitations as learning sites and mature workers, with their greater life experience, are more likely to be aware of these limitations (Smith et al., 2007).

Identifying training needs

There can be an obvious need for the continuous training of workers, including older workers, driven by the requirements of the company, for example when a new technology or process is introduced. But in many cases training needs are less visible and have to be identified. Good practice among companies seeking to increase the productivity and workability of their workforce starts with identifying skills needs through dialogue with employees. Thus, the above-mentioned mid-career interviews are used to identify

skills needs in the career planning of older workers. Good practice at a Swiss manufacturer shows that this can lead to the implementation of a wide range of training measures, including re-training (OECD 2014a). In the case of a Finnish food industry company seeking to lengthen working lives and reduce sick leave, the company starts with a developmental discussion between the employee and the line manager to map out possible restrictions of work and the rehabilitation and training needs for the current and prospective new tasks. From the company's point of view, training and coaching for prospective new tasks must also take into account the needs of the older workers. In the case of a Dutch printing company, the training needs of older workers are identified during regular performance interviews between the worker and the mentor. These interviews form the basis of a personal development plan for each older worker (Lindley et al. 2006).

The training of human resource (HR) staff to increase their sensitivity towards older workers should be highlighted as good practice (Lindley *et al*. 2006). It can be assumed that managers' personal opinions on the benefits of investing in training for older workers has a significant impact on the training activities of companies.

Age-related skills and innovation management

For a long time, it was commonly thought that young people have more innovative ideas (see e.g. Höpflinger 2006). Dworshak et al. (2012) take stock of the evidence on the different factors that determine the innovation capacity of the workforce: motivation, creativity, social competences and knowledge. With regard to motivation literature is scarce, but the authors conclude that older workers may be as motivated, but need different incentives to younger ones. Furthermore, they might be less willing to take on the role of pushing and implementing innovation and, in this respect, an ageing workforce can represent a risk for the innovativeness of a company. As regards creativity, the authors conclude that creativity as such may call for good cognitive skills and these are better developed in younger workers. However, in relation to the role of the innovator experience and social competences come into play and therefore "crystallised intelligence" is the focus, an acknowledged strength of older workers. As a policy recommendation the authors suggest the promotion of a creative environment and the creative skills of workers. Finally, the role of knowledge in the innovation process also calls for both younger and older workers, as "new" occupational / technical knowledge is as important as experience-based knowledge. Heidling et al. (2015) points to the better skills of older workers in dealing with unpredictable situations. This is an asset for the innovation process. Workers can acquire these informal competences if they have been working in an environment allowing for process-based learning.

Organising the inter-generational knowledge transfer within the company

The organisation of inter-generational knowledge transfer has often been mentioned among good practices implemented by companies, although it is not known how widespread this practice is.

The rationale behind the organisation of knowledge transfer lies in:

- Ensuring that the company does not lose the tacit, experienced-based knowledge of workers once these workers retire;
- Reducing further training costs by internalising training on firm-specific skills (see e.g. Centre for Workplace Skills, 2011);
- Allocating older workers tasks in which they perform well.

The German Federal Ministry of the Economy has issued guidelines for the organisation of the knowledge and experience transfer in a structured and more formalised way (BMWi 2012). Key instruments for encouraging learning, as well as specific and experienced-based knowledge transfer, include: (i) organising work into mixed age teams, allowing for learning from both "new" knowledge and experienced-based knowledge; (ii) setting up "learning tandems", which are established for a defined period of time, allowing learning and knowledge transfer to take place while carrying out common tasks and documenting this learning; (iii) mentoring; (iv) transferring tasks via moderators; in this case a moderator facilitates several meetings or the transfer of a task / responsibility from the old job holder to the new one, in particular for managerial positions. The role of the moderator is to structure the knowledge transfer and to ensure that relevant information and knowledge is transferred; (v) establishing a list of contact details, competences and fields of experience. A climate of trust within the company is necessary to motivate employees to share their knowledge. In order to be effective, information, for example on specialities, needs to be updated regularly; (v) developing in-house company wikis; this knowledge data base can be filled in by the workers themselves. The development of this tool is time consuming and requires training for the knowledge manager and other staff. Regular updates are essential. On the positive side, this tool may foster the attachment of the worker to the company, boost innovation, increase transparency on the knowledge within the company, and reduce costs through avoiding mistakes.

One good practice for certain tasks can be the establishment of tandems of one older and one younger worker. For example, in a Swiss financial services company these tandems were created not only for knowledge transfer, but also for the transfer of the client network (OECD 2014 a).

The case of a fish and chip shop in the UK showed how value can be found by having a trainee train the rest of the company. After one worker developed her skills through training and achieving certification, she then returned to work and instructed the other members of the team (Centre for Workplace skills 2011).

Good practice examples show the necessity of "training the trainer". In the context of a pilot programme carried out in Germany, around 1 000 older people were trained as senior trainers. As a result, new curricula of further training courses have been developed. These curricula are designed to leave sufficient room for the senior worker to bring in their experience-based knowledge and, consequently, to become confident about their competences and new role as a future trainer (Engels et al., 2008).

Conclusions

Participation in continuous vocational training is positively correlated to educational level. Good practice examples therefore show approaches on how to increase the skills levels of low-skilled older workers. In general, it will be crucial to increase the level of continuous vocational training for workers in future. In addition to the level of participation, it is important to develop a learning culture within the workplace and to make sure that tasks carried out have the potential for learning. Training needs should be identified and training methods may need to be adapted to the experience level of the worker. Valuing experience is a key factor for ensuring inter-generational knowledge transfer and identifying tasks where older workers are productive, and is therefore beneficial to the innovation capacity of the entire company

CONCLUSIONS AND RECOMMENDATIONS FOR LOCAL ACTORS

Employment rates of older workers are on the rise and companies have been confronted with the need to develop age management strategies for a number of reasons, mainly the age structure within the company, the restricted possibilities for early retirement, and labour shortages within local labour markets. A wealth of good practice for age management within companies has been collected and disseminated by a variety of stakeholders, including at the local level. The examples show that productivity gains can be achieved if age management measures are thoroughly designed and implemented.

Nevertheless, the "knowing-doing gap" is still wide. There is still room for improvement in sharing information on good practices and tools designed to support the development of age management strategies. General guidelines for age management have their limitations because of the heterogeneity of older workers as well as the more limited strategic human resources management capacities of smaller companies. Guidelines and consultancy need to take into account the different management styles and conditions of different size companies (Schreitmüller 2015).

Companies often show contradicting behaviours and perceptions regarding older workers, depending on whether they are workers within the internal (company) or external labour markets. Prejudices and discrimination are still present and the dividing line for older workers in the labour market is particularly deep. While companies are improving their strategies to increase flexibility and mobility within the firm, there is a danger that poor inter-firm and inter-sector mobility will dampen the dynamics of the labour market when the share of older workers in the workforce is rising.

It is therefore recommended that efforts to raise the awareness of both managers and employees are continued and intensified. Guidance for SMEs, as well as coaching, mentoring and guidance for older workers and older job seekers, should be provided on a wider scale. Social partners should introduce age management issues in collective bargaining. Training social partners at the local level can push the implementation of age management.

At the local level, the Public Employment Services, as well as sector organisations, should raise their efforts to increase mobility. It is recommended to build-up networks and foster co-operation between various stakeholders at the local level.

Local stakeholders in the education and training fields can adapt their training offers to the specific learning and skills needs of older workers. They can, furthermore, be involved in developing approaches to formalise and structure informal workplace related learning, which in turn can increase mobility. Finally, local actors can improve the information they hold on regional labour markets, for example by conducting skills forecasting and by developing a partnership culture at the local level to discuss the demographics of of the labour market. Companies should foster a life-long learning culture for workers of all skills levels. Local actors can implement awareness raising measures in this respect.

Local stakeholders should also improve conditions for a better work-life balance, in particular with regard to the caring responsibilities of older workers. Finally, they should strive to offer a healthy environment, which would have a positive impact on the productivity of workers.

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