

# A cross-national study of employment initiatives for an ageing workforce

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- Introduction to the study „Employment Initiatives for an Ageing Workforce“
- Clusters of organisational and external drivers for age management
- The evolution and benefits of initiatives
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# Research Team

- The project is funded by the European Foundation of Living and Working Conditions in Dublin ([www.eurofound.eu.int](http://www.eurofound.eu.int))
- Joint project coordination by the Institute of Gerontology at the University of Dortmund and the University of Cambridge

- 11 of the EU-15 countries take part in the project:



Austria



Greece



Belgium



Italy



Finland



The Netherlands



France



United Kingdom



Germany



Sweden



Spain

## European background to the study

- The project “Employment Initiatives for an Ageing Workforce” shows strong links to the European employment policy debate.
- The European Union has set itself two important goals to be achieved by 2010:
  - to increase the employment rate of older workers (55 plus) to 50% (Stockholm target) and
  - to delay by five years the age at which older workers stop working (Barcelona target)
- Follows the European strategy of active ageing

## Current employment situation of the 55+

- Most countries lag behind the Stockholm target
- The overall employment rate in the EU-15 countries was 42.5% in 2004
- Only Denmark, Finland, Portugal, Sweden, and the United Kingdom already fulfill the Stockholm target
- Very low employment rates of the 55+ in Austria, Belgium, Italy, and Luxembourg (about 30%)
- Germany 41.8%

→ **Strong need for age management strategies**

# Aims of the study „Employment Initiatives for an Ageing Workforce“

- Document current measures and initiatives in organisations (private and public) to improve the employment situation of older workers
- Identify factors influencing the success and sustainability of initiatives over time
- Review lessons and formulate guidelines for good practice in age management of the workforce

All in all about 130 case studies have been carried through.

# Products

- Searchable web database of case studies
- Guide to good practice in age management (Naegele/Walker 2006)
- Consolidated analytical report:  
Philip Taylor (forthcoming): Developments in Employment Initiatives for an Ageing Workforce. Luxembourg.

# Methodological aspects – Selection of cases

- Sources
  - European Portfolio of Good Practice (EF 1998)
  - arbeitundalter.at
  - Age and Working Conditions in the EU (EF 2003)
  - Other national sources
- Selection criteria
  - Company based
  - Longstanding initiatives
  - Life-course approach
  - Gender sensitivity
  - Social partnership approach
  - Transferability



# Methodological aspects – Interview guideline for researchers

- Scope of interviews
  - representative of the senior/line management
  - representative of the work council/the employees
  - interview with a person in charge of the initiative
- Structure
  - Organisational background
  - Description of the original initiative
  - Development of the initiative
  - Good practice today

## Dimensions of age management practice

- Job recruitment
- Learning, training and lifelong learning
- Career development
- flexible working time practices
- Health protection and promotion, and workplace design
- Redeployment
- Employment exit and the transition to retirement
- Comprehensive approaches that strategically encompass a wide of different coordinated measure

# Clusters of organisational and external drivers for age management

1. Business cases: Keeping the organisation productive and/or increase competitiveness
2. Corporate culture and social responsibility
3. Demographic issues
4. Driven by actors: HR-Managers and external agencies
5. Collective agreements, laws and regulations
6. National/EU policy context

# Clusters of organisational and external drivers for age management I

## 1) Business cases

- Coping with (regional) labour shortage and need to maintain productive staff composition
- Cost containment: reducing high level of sickness and absenteeism
- Rationalisation and restructuring
- Changing business environment and need to maintain employability of ageing workforce

## 2) Corporate culture and social responsibility

- Equal opportunities and diversity policy
- Corporate social responsibility

# Clusters of organisational and external drivers for age management II

## 3) Demographic issues

- Exit of experienced workers: Knowledge retention and capture
- Ageing of specific consumer markets

## 4) Driven by actors: HR-Managers and external actors

- Age aware human resource management
- External training, consultancy and employment agencies

# Clusters of organisational and external drivers for age management III

## 5) Collective agreements

- Employment security agreements
- Working time flexibilisation agreements

## 6) National/EU-Policy

- Curtailment of early exit
- Anti-discrimination legislation
- National programmes/specific measures to promote older workers

## Further comments on drivers

- Overall, business cases constitute the most important and widespread reasons for implementation of age-aware policies
- However, the precise order of importance of drivers differ between organisations and countries
- There is overlapping between categories of drivers and in reality the drivers are often difficult to disentangle – often more than one driver can be observed

# Evolution of initiatives

## 3 types of evolution

- Only some of the initiatives have ended (14%)
- A bigger part of the initiatives still continues (34%) – more or less unchanged
- The largest part of the initiatives has been modified (46%)



# Reasons for the ending of initiatives

- Merger/changed management structures
- Economic pressure
- Changed personnel and/or recruitment policy
- Adverse effects (e.g. unbalanced age structure)
- Problems solved
- Promoter left the company or changed to another department

# Benefits for older workers

- Employment opportunities
- Maintenance or enhancement of health and well-being
- Learning opportunities and skill utilisation
- Better relations with co-workers and managers (improvement of intergenerational relations)
- Better preparedness for retirement

# Benefits for organisations

- Securing labour supply
- Reduced labour costs
- Decrease in sickness absence rates
- Greater productivity
- Enhanced innovative capacity
- Increased management competence
- Better (intergenerational) knowledge sharing
- Better cooperation between management and works council/trade union
- Image gain

## Evaluation of initiatives

- On a more qualitative level most companies are satisfied with the effects.
- In most cases we didn't find a quantitative evaluation of measures.
- Exception: Finland and Austria (scientific evaluation of measures)

# Requirements for success and sustainability in age management

- Age awareness
- Careful planning and implementation
- Improvement of working conditions
- Cooperation of all parties concerned
- Continuous communication
- Internal and external monitoring
- Evaluation and assessment

You will find the case studies and other documents on the  
webpages of the European Foundation

[www.eurofound.eu.int](http://www.eurofound.eu.int)

Thank you for your attention!