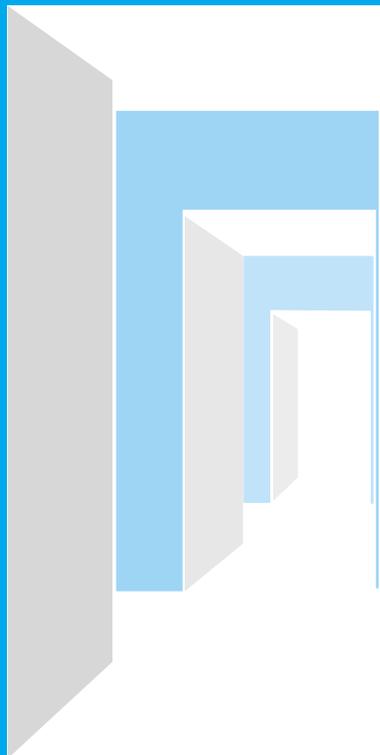


# Combating Age Barriers in Employment: A European Portfolio of Good Practice



EUROPEAN FOUNDATION  
*for the Improvement of Living and Working Conditions*

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The European Foundation for the Improvement of Living and Working Conditions is an autonomous body of the European Union, created to assist the formulation of future policy on social and work-related matters.

This report has been edited for the Foundation by Alan Walker and Philip Taylor.

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Edited  
by

**Alan Walker and Philip Taylor**



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## Foreword

Member States in the European Union are beginning to show evidence of some rethinking of existing trends towards early retirement and early exit from employment. This report is based upon studies across the EU which aimed to document and assess initiatives in both public and private sectors, to combat age barriers in employment, particularly in recruitment and training. The portfolio presents more than 150 examples of good practice in age management. Its primary intention is to inform and stimulate positive action for an ageing workforce by providing practical examples of how different private and public organisations have sought to minimise the impact of age barriers in the workplace. The portfolio complements the European research report *Combating Age Barriers in Employment*.

**Clive Purkiss**  
Director

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We are extremely grateful to our research collaborators for preparing the summaries on which this portfolio is based and for making helpful comments on a draft of this portfolio. We are also grateful to the European Foundation for the Improvement of Living and Working Conditions research managers for this project for their constructive comments and support throughout the project.

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## Chapter One

## Introduction

This report consists of examples of good practice in combating age barriers in employment in a variety of European countries. Its primary intention is to inform the debate in Europe about age and employment by providing practical examples of how different private and public organisations have set about trying to minimise the impact of age barriers in job recruitment and training. In doing so we must acknowledge that, in all European countries, age discrimination in the labour market is commonplace (Drury, 1993; Walker, 1993) and early exit strategies such as targeting older workers for redundancy are still favoured by many European employers as the way to reduce their workforces (Kohli, *et al*, 1991; Guillemard, 1993; Naschold and de Vroom, 1993). Indeed some of the organisations represented in this portfolio have resorted to such age discriminatory approaches to workforce reduction *despite* their recognition of the need to combat age barriers in recruitment and training. Thus we are not attempting to put an unrealistic gloss on the real labour market conditions facing older workers or the harsh economic climate surrounding some commercial companies. But, rather, these case studies provide indications of good practice - tiny beacons of light - that could be followed by other private, public and non-governmental organisations. Only a small number of the case examples in this portfolio can be regarded as culture-specific, therefore we commend them in the spirit of European collaboration and potential convergence.

This portfolio has been created by the European Foundation for the Improvement of Living and Working Conditions project on Combating Age Barriers in Job Recruitment and Training. The project commenced in April 1994 with the principal aim of documenting and assessing initiatives, in both public and private sectors, to combat age barriers in employment, particularly for older workers. Seven member states (Belgium, France, Germany, Greece, Italy, the Netherlands and the

UK) were selected for the research and leading researchers on age and employment were engaged (full details of the research teams are provided in Appendix 1). Each research team prepared a national report comprising four elements: a review of ageing and employment issues in their own country; an outline of the perspectives of the social partners, based on a workshop organised by the team; a portfolio of initiatives demonstrating good practice in age management; and a small number of in-depth case studies of organisations in the portfolio. This report is based on the national portfolios while the main report *Combating Age Barriers in Employment - a European Research Report* synthesises the lessons from the in-depth case studies and makes recommendations for policy and practice. There is also a short report *Combating Age Barriers in Employment - Research Summary*, which summarises the project's main findings and recommendations.

In addition, it was considered helpful to include a small selection of case studies from some new member states and experts from Finland and Sweden provided this material towards the end of the project. But, because of the time constraint they were not able to conduct similar systematic reviews to those of the main research collaborators.

## **BACKGROUND**

The background to this project and portfolio is the paradox confronting most EU countries: an increase in the average age of the economically active population, but, as a result of the continuous lowering of labour force exit thresholds, people over 40 are increasingly regarded as nearing the end of their working lives. This paradox has to be addressed at both macro- and micro-levels. Several European governments are currently reversing the public support they previously gave to early exit from the labour force and are seeking ways of reducing the costs of early retirement (Delsen and Reday-Mulvey, 1996). Some employers are also reassessing their attitudes towards older workers, with some even constructing a positive 'business' case for employing this group (Walker, 1995). Trade unions too are reconsidering their support for early exit strategies.

Thus, across the European Union, we are beginning to see the emergence of a positive case for combating age barriers in job recruitment and training on the grounds of pragmatism, commercialism, good human resource management practice and in the interests of justice and fairness. Equally however, it must be recognised that practical action in pursuit of these aims has been taken by only a minority of European employers. Moreover there are differences among European countries in the extent to which age barriers are being tackled (Guillemard and Walker, 1994).

## **GOOD PRACTICE IN AGE MANAGEMENT**

This portfolio focuses on a range of examples of good practice in the recruitment and training of ageing workers in different European countries. However, because 'good practice' is a relative concept and there is considerable diversity in approaches to workforce ageing in Europe it was not considered helpful to adopt a protocol that was too rigid. Therefore, operationally, 'good practice' was defined as the *best available* given particular national circumstances and the shortage of time in which to identify initiatives. It was also important to be aware that 'good practice' may be intended or claimed at a senior level in an organisation but not implemented

Good practice is most usefully defined with respect to specific policies but first, in general terms, we might say that *good practice in the employment of older workers consists of combating age barriers, either directly or indirectly, and providing an environment in which each individual is able to achieve his or her potential without being disadvantaged by their age.* In order to achieve this goal policies do not necessarily have to be labelled ‘older worker’ policies - there may be general human resource (HR) strategies that are of particular benefit to mature employees. For example a system of annualised hours has proved to be particularly helpful to ageing workers with caring responsibilities but it is not intended as an older worker-specific HR strategy. Inevitably the selection of examples of good practice entails a value judgement that a particular initiative is reducing age barriers in employment and that this is a desirable outcome.

In specific terms there are five dimensions to age management in organisations (Casey, Metcalf and Lakey, 1993):

1. Job Recruitment and Exit
2. Training, Development and Promotion
3. Flexible Working Practice
4. Ergonomics/Job Design
5. Changing Attitudes to Ageing Workers Within Organisations

Within these five dimensions we might define good practice as follows:

### **1. Job Recruitment**

Here good practice means ensuring that older workers have either equal or special access to the available jobs and that potential applicants are not discriminated against either directly or indirectly. For example, the absence of age bars and other discriminatory mechanisms in advertisements and other methods of recruitment. Another example is positive discrimination in recruitment to overcome age barriers. Good practice may also consist of self-employment. In non-workplace settings good practice may include specific skills training to improve job seeking/finding or employment counselling and job search support. It could also mean the provision of support to a self-help group of older people designed to promote their own employment or that of other mature people.

Chapter 2 contains 50 such examples of good practice in job recruitment. The majority are based in private sector companies, with nine in the public sector (2, 19, 28, 31, 38, 46-49) and 12 in the NGO sector (1, 3, 26, 32, 33, 35, 39, 42-45, 50). Most of these initiatives are workplace based, though there are 17 exceptions (26, 27, 32, 33, 35, 37-40, 42-48, 50).

### **2. Training, Development and Promotion**

Here good practice means ensuring that older workers are not neglected in training and career development, that opportunities for learning are offered throughout the working life and that positive action is taken where necessary to compensate for discrimination in the

past. Examples of policies and practices designed to achieve these ends include the creation of a learning environment at the workplace; ensuring that training is available regardless of age; and making training ‘older worker friendly’ by tailoring it to the learning methods and experience of older employees or by providing special courses to redevelop the ability and enthusiasm to learn. Good practice in this area may be promoted by non-workplace based initiatives, for example, by the provision of training to older workers in community programmes, and short-term work placements.

Chapter 3 contains 51 examples of good practice in the area of training, development and promotion. Again the majority are found in private companies, with only four in the public sector (59, 66, 90, 97) and eight in the NGO sector (51, 57, 82, 96, 98-101). The majority too are based at the workplace (the eight exceptions are numbers 57, 59, 82, 96, 98-101).

### 3. *Flexible Working Practice*

Here good practice may be defined as affording older workers greater flexibility in their hours of work or in the timing and nature of their retirement. Of course such flexibility may benefit younger as well as older employees (as with annualised hours) but, specifically, with regard to older people, such flexibility may be an important method of retaining this group in employment or provide an attractive feature for recruitment purposes. Certainly there is evidence of a desire on the part of older employees for greater flexibility in working practices and, therefore, good practice consists of accommodating these wishes as far as is practicable in different organisational settings. Examples of such flexibility include gradual retirement, flexibility over retirement age (including the possibility of working beyond normal retirement age) and the provision of part-time employment (for those under and over retirement age).

Because the main focus of this project was on job recruitment and training initiatives there are far fewer examples of the other categories of good practice in this portfolio. The first section of Chapter 4 contains 14 examples of flexible working practices, all but two of them (114, 115) are in the private sector and all are workplace-based.

### 4. *Ergonomics/Job Design*

Good practice with regard to job design may take the form of preventative measures or those intended to compensate for physical decline. On the preventative front there is a wide range of ways in which work induced illness and disability may be prevented by improved job design, for example by the elimination of heavy lifting or violent twisting movements, the provision of beneficial lighting and seating. For those ageing workers that are experiencing physical decline it is possible to modify the workplace in order to assist them to maintain their productivity and, therefore, to remain in employment. For example changes in lighting levels to compensate for poorer eyesight or alterations to workstations in order to avoid arduous bending and reaching.

The second section of Chapter 4 contains nine examples of good practice in the area of ergonomics/job design - all of them involving private companies and based at the workplace.



## 5. *Changing Attitudes Within Organisations*

The introduction of good practice in recruitment and training rests on the commitment of key personnel, such as managers, recruiters and employment services staff. Therefore changing the attitudes of such staff towards older workers may be a vital prerequisite to the development of good practice for older workers. Aspects of good practice in this sphere would include a positive approach to combating ageism and dispelling the way this is associated with ageing workers by, for example, the presentation of evidence from a variety of sources demonstrating the benefits of employing and investing in this group. Such evidence may include examples from within the organisation or from other similar ones or the results of more broadly-based scientific research. As well as raising awareness about the need for good practice in the recruitment and training of older workers there may be a need for special training in equal opportunities, with reference to age, or in the particular needs of an ageing workforce.

There are four examples of good practice in changing attitudes, located in section III of Chapter 4: one in the public sector (128) and the others in private companies. Three out of the four are workplace-based and one (126) is not.

Although the main focus of the project is on job recruitment and training, the research teams were mindful of all five dimensions of age management because the boundaries between these different areas are often blurred. For instance, it may be that in order to achieve good practice in recruitment and training a major initiative will be required throughout the organisation to change attitudes and raise awareness. Similarly the provision of flexible working arrangements or innovative job design may prove to be the keys to the successful recruitment of older employees. As will be seen from the following examples it was often impossible to disentangle initiatives on recruitment and training from other aspects of age management. This should not be surprising: if an organisation adopts HR policies that emphasise equal opportunities this orientation is likely to permeate all aspects of employment. Furthermore training *per se* may not be the main goal of an 'age aware' HR strategy but, rather, a means to achieve other goals, such as alterations in work processes. In the final section of Chapter 4 we have included 27 examples where good practice covered a number of dimensions or where genuinely integrated age management strategies had been adopted (144-147, 153-155).

Thus the research teams were asked to include *all* initiatives that have an impact on the recruitment, training and development of ageing workers. They were specifically asked to seek out examples from both public and private sectors, large and small organisations, rural and urban areas, and initiatives sponsored by national governmental or local agencies or trade unions, which have enhanced the employment prospects of older workers. Where possible researchers were asked to provide information about initiatives with a particular focus on gender or ethnicity (Walker, 1995), but, in practice, such examples proved to be elusive.

This portfolio of examples, therefore, is illustrative of initiatives to combat age barriers in job recruitment and training and to improve the employment prospects of ageing workers. The majority are transferable both within and between EU countries.

## METHODOLOGY

A range of approaches were utilised to ensure that the examples of good practice collected in each country were either the best ones available or representative of a wider selection. Despite the short timescale of the project systematic techniques were used by the researchers in searching out these case studies. These include national postal surveys, literature searches and the ‘snowball’ method whereby contacts with initiatives are progressively gathered in as one contact leads to another and the project becomes known more widely. A more detailed account of the methodology used in each country is provided in Appendix 1. In all 159 examples of good practice were presented by the national experts and these were whittled down slightly to 149. This process was mainly a matter of avoiding duplication and excluding those examples which were either out of scope or not sufficiently detailed. A further four cases have been added from Sweden and two from Finland making a total of 155. The Scandinavian case studies were provided by leading experts in the field in Finland and Sweden, though they were gathered less systematically and at even greater speed than those from the main research team. Table 1 shows the distribution of initiatives by the country of their origin.

*Table 1 National Origin of the Initiatives*

Country	Number of Initiatives
Belgium	11
Finland	2
France	19
Germany	24
Greece	21
Italy	17
Netherlands	26
Sweden	4
UK	31
<b>Total</b>	<b>155</b>

## CLASSIFICATION OF EXAMPLES

The five dimensions of age management outlined above were used as the basic framework for the case studies in this portfolio with particular emphasis being placed on job recruitment and training. However, during the course of the research a more detailed classification was developed (chiefly by Bert de Vroom) which allowed the researchers to categorise their case studies in a relatively sophisticated manner. Two categories - changes in exit policy and ‘other’ policies - were added to the five main ones and each was further sub-divided into more specific policies and practices (see Table 2). In practice most examples spanned several sub-categories and, therefore, in this report we have divided the examples into three broad groups: i) job recruitment and placement; ii) training and iii) those that either span both or represent more general HR strategies

Table 2 *Types of Good Practice*

<b>I</b>	<b>Job Recruitment</b>	
	– increasing maximum age limit	1.1
	– elimination/absence of particular age barrier	1.2
	– positive discrimination	1.3
	– support of self-help group to promote their own employment	1.4
	– training programmes to promote recruitment policies	1.5
	– employment exchange/job centre for older workers	1.6
	– other	1.7
<b>II</b>	<b>Training, Development and Promotion</b>	
	– development of training and educational programmes, in particular for older/ageing workers	2.1
	– existing training and educational programmes opened to older/ageing workers	2.2
	– creation of learning environment and workplace mentorship for older workers	2.3
	– career development	2.4
	– evaluation of performance	2.5
	– promotion of age-specific policy in work organisations	2.6
	– other	2.7
<b>III</b>	<b>Flexible Working Practice</b>	
	– job rotation	3.1
	– flexible working hours/age related working time	3.2
	– age related leave	3.3
	– demotion (without change in wage level)	3.4
	– demotion (with decrease in wage level)	3.5
	– part-time jobs	3.6
	– flexible retirement/early exit scheme	3.7
	– gradual retirement scheme/part-time “early exit”	3.8
	– self regulation of pace	3.9
	– other	3.10
<b>IV</b>	<b>Ergonomics, Job Design and Prevention</b>	
	– ergonomic measures/improvement work conditions/ workload	4.1
	– organisation of tasks	4.2
	– mix of young and older workers	4.3
	– age related health and/or wealth control	4.4
	– older workers excluded from shift labour	4.5
	– other	4.6
<b>V</b>	<b>Changing Attitudes within Organisations</b>	
	– research related to ageing and performance	5.1
	– programmes to change attitudes and opinions towards older workers	5.2
	– other	5.3

<b>VI Changes in Exit Policy</b>	
– elevation of minimum age of early exit	6.1
– abolition of early exit programmes	6.2
– elevation of normal retirement age	6.3
– other	6.4
<b>VII Other Policies</b>	
– general age related policy; seniority programmes	7.1
– sectoral age related policy as result of Collective Agreements	7.2
– future plans	7.3
– recognition of caring responsibilities	7.4
– other	7.5

Because of the possibility of multiple coding the presentation of these examples might have been unnecessarily complicated - initially the examples generated more than 650 main and subsidiary codes! For simplicity's sake we have concentrated on the single main code for each example as the basis for our indexation, but we have also included codes alongside each initiative which reflect the range of good practice. For example, initiative 17 is classified by code 1.2 but it also reflects good practice under 1.3, 2.1, 2.5, 3.7, 3.8 and 4.3. Similarly, initiative 8, is grouped under 1.2 but also covers 2.1, 2.2, 2.4, 2.5, 3.2, 5.2, 6.2, 7.1 and 7.4. We have endeavoured to overcome this deficiency by using both main<sup>1</sup> and subsidiary codes in the index. Where there was no single main code or where initiatives represented integrated policies we have placed them in the final section of Chapter 4. The index uses the detailed classification to provide a reference guide to the examples in this portfolio. Table 3 (see back of publication) is a graphical representation of the index. However, because there was variation between the national reports in the use of sub-codes, this index can provide only a rough guide to the incidence of different examples of good practice.

## SUMMARY

As Table 3 shows the majority of the portfolio examples and case studies are located in relatively large, private, profit making companies. Community based initiatives or initiatives by local government employers are much less common. In addition, very few of the initiatives are located in small organisations.

Initiatives concerned with the recruitment of older workers are much less common than initiatives concerned with flexible working practices and job training, development and promotion, although those concerned with job recruitment are more frequently reported than initiatives concerned with ergonomic measures. Examples aimed at changing attitudes towards older workers and those aimed at changing early exit policies occur infrequently among the national portfolios.

Turning to the types of initiatives reported by the research teams, UK examples are most frequently concerned with job recruitment although a significant number also cover flexible

working practices. All of the initiatives reported by the Italian team focus on either job recruitment or job training, development and promotion. The most frequently applied descriptor to the initiatives from France and Belgium is that of flexible working practices. The Greek cases mostly focus on training, development and promotion. In fact both the Greek and French teams report a significant number of initiatives in the areas of job training, development and promotion, flexible working practices, ergonomics/job design and prevention. By contrast the Netherlands portfolio contains a significant number of initiatives in only one area: job training, development and promotion. The descriptor most commonly applied by the German team to its initiatives is training, development and promotion.

There was considerable variation in the types of initiatives reported by the research teams. Thus, the UK portfolio contains far more initiatives concerned with job recruitment than the other teams. The German and British research teams report the vast majority of initiatives which are concerned with the development of training initiatives specifically for older workers. By contrast, the Greek and French teams report the majority of initiatives concerned with opening up existing training programmes to older workers. The British and Greek portfolios include most of the career development initiatives. Turning to flexible working practices, the British and French teams report most of the initiatives which focus on flexible working hours or age related working time. The British and Greek portfolios include the most flexible retirement initiatives. By contrast the French team reports the majority of examples of gradual retirement. No examples of flexible working practices are included in the Italian portfolio. Ergonomic measures are most frequently reported by the French team followed by the Greek team, whereas the Dutch portfolio includes only a few such initiatives and the Italian one includes none.

## **THE NEXT STEPS**

The examples contained in the following three chapters of this portfolio were generated by the first European research project to focus on good practice in combating age barriers. The project demonstrated that, regardless of the attitudes and actions of national policy makers towards age discrimination, there is a significant amount of activity taking place, at the workplace and in the community, to tackle age barriers. Moreover this activity encompasses a very wide range of public and private organisations. Indeed we were genuinely surprised by the fact that initiatives to combat age barriers were found in all seven countries, northern and southern, and by the scope and depth of some of them.

This portfolio is intended as a reference tool for those - social partners, individual employers, NGOs - interested in this field and, crucially, in a position to improve the job prospects of ageing workers. We hope that this portfolio will be used as a source of illumination with regard to good practice in combating age barriers as well as a source of ideas based on the practical experiences of those that have already implemented such measures. Also we hope that the wide range of examples contained herein will encourage employers in particular to recognise that such action is both possible and beneficial and, therefore, will create an incentive to take action. As the portfolio cases show, measures to combat age barriers may consist of relatively small, tentative first steps

(as, for example, in case numbers 14 and 21) through to comprehensive strategies (numbers 143-147, 153-155). In other words it is not necessary to try to do everything at once, there is a great deal that organisations can do quickly and cheaply to overcome age barriers. On the other hand, if a comprehensive age management strategy is the goal, there are good examples here to learn from.

This portfolio contains 155 examples of good practice reported in summary form to provide a quick reference guide. As noted above, the research also studied a small number of these in greater depth. The results of that part of the research are synthesised and the main lessons for the implementation of good practice in this area are reported in the main project report (Walker, 1997a). Also there is a short summary of the project's findings and key recommendations (Walker, 1997b).

As well as producing a fine array of good practice initiatives the research also generated a useful classification system (Table 2). As can be seen from the index this also provides an easy-to-use source of reference.

While there is no doubt that this project has broken new ground in the collection of European examples of good practice in combating age barriers, we cannot pretend that there is not still a great deal to do. In the first place, with regard to research on good practice, even more systematic approaches are required to search out other examples, if they exist, so that a complete picture can be produced. Secondly, with regard to the spread of good practice in Europe, this research suggests that only a very small minority of organisations have begun to tackle age barriers. It may well be that further examples will be uncovered by more systematic research but we doubt that our pessimistic conclusion about the general evidence of good practice will be altered very much by such work. Moreover the apparent lack of activity among small and medium size enterprises (SMEs) is particularly worrying because, in the EU as a whole, nine out of ten employees work in them. Such examples are harder to find than those in larger organisations and, again, their under-representation may be an artefact of the research, but we suspect that this may be true to only a limited extent: action on age barriers at the workplace appears to be confined mainly to large organisations. Also disappointing is the lack of initiatives in the portfolio focused on gender and ethnicity.

Our conclusion, therefore, consists of both negative and positive elements. The bad news is that age discrimination is still widespread in the labour markets of EU countries and that there are far too few examples of organisations, especially SMEs, taking action to combat age barriers. The results are that the employment prospects of many hundreds of thousands of older workers in the EU are being blighted; employers are wasting human resources and creating unnecessary skill shortages and national social security budgets are being inflated. The good news, however, is that a minority of employers, in the public and private sectors, and community-based NGOs are demonstrating that it is possible to take practical action to combat age barriers. They are blazing a trail that others could follow easily if they are so minded.



## Chapter Two

## Recruitment and Placement Initiatives

### **INCREASING MAXIMUM AGE LIMIT**

**1.1**

#### **1. L'Incontro Cooperative (Italy)**

**1.3, 1.4,  
3.2, 3.6**

This NGO operating in the public service sector relies mainly on the employment of older workers who have taken early retirement because of labour shortages and because of the workforce flexibility this offers. It has developed two units to provide employment for people exclusively aged over 40. One employs professionally qualified nurses who provide health assistance, while the other employs art teachers who help with the rehabilitation of those suffering from psychiatric and alcohol-related problems. Both try to accommodate the needs of the older staff by allowing them to organize their working hours on the basis of part-time work schedules and job-sharing. Since targeting older workers management have noticed a major improvement in the quality of client services and a decline in absenteeism.

L'Incontro is a social cooperative based in Castelfranco Veneto (Treviso) operating in the personal services sector. It was set up relatively recently (March 1991) and started out by managing, in agreement with the local public authorities, two residential homes for elderly people in need of support or suffering from psychiatric or alcohol-related problems (for about 30 people). Subsequently, this was added to by an occupational day centre for the social, mental and physical rehabilitation of those, including young people, suffering from psychiatric illness and alcohol-related problems (for 15 people). At the present time, a comprehensive treatment plan is being drawn up for disabled people in the area providing two further units offering assistance and rehabilitation facilities for some further 40 people.

**11**

In carrying out its work, the cooperative relies mainly on the employment of older workers who have taken early retirement (eg. for personal reasons, because of restrictions placed on their activities). To this end, it has developed two other bodies (La Sorgente cooperative and La Meridiana association) to provide employment for people exclusively aged over 40. La Sorgente employs as social workers professionally qualified nurses (currently 16 women and one man) who provide health assistance, while La Meridiana currently employs about 15 people as art teachers who help with the rehabilitation of those suffering from psychiatric illnesses and alcohol-related problems employed in the day centres. In both units considerable effort is made to accommodate the needs of the older staff by allowing them to organize their working hours on the basis of part-time work schedules and job-sharing.

L'Incontro initially gave preference to the recruitment of older staff mainly because of:

- a. the dire shortage of specialized staff in this field, particularly in the nursing sector;
- b. the possibility of having a highly flexible workforce while limiting service costs.

In addition to achieving both these objectives, the recruitment of older employees has also had the following two unexpected results for L'Incontro:

1. a major improvement in the quality of client services (this is delicate and stressful work and long working hours inevitably lead to a decline in the quality of service offered);
2. improved overall staff management since, as a result of extending to all staff the flexible working hours introduced for older workers, absenteeism has declined.

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## **1.2 ELIMINATION OF AGE BARRIERS**

### **7.3 2. Commune of Torino and ICS Consortium (Italy)**

The communal administration has supported unemployed people by providing temporary employment. Half the participants are aged over 40. Participants carry out socially useful tasks for six months. To coordinate the various workforces, 15 Fiat managers who had taken early retirement were employed. In mid-1994, administration of these schemes was handed over to the ICS Consortium consisting of 20 social cooperatives, half of which aim to employ disadvantaged people. The reason for entrusting these schemes to an external body was that the communal administration wanted to take concrete steps towards the employment of disadvantaged people. Although this was the project's initial aim, these schemes had become a simple social benefit disguised as work.

Torino is the main city in the Piemonte region situated in north-west Italy. An important industrial area and the home of Fiat, the metropolitan area has a population of over 1.5 million with a higher percentage of people employed in the industrial sector than almost any other large Italian city. For this reason, since the early 1980s it has experienced the problem of adult unemployment caused



The communal administration has supported redundant workers by providing temporary and extraordinary employment each year for unemployed men and women without an income aged 18-61 and 18- 56 respectively. This employment lasts for six months (equal to 130 working days) and provides for small teams of workers to carry out socially useful tasks such as the maintenance of public parks and gardens and other public facilities, etc. At least 50 per cent of the jobs available are reserved for women. The activities are financed mainly under Regional Law No. 55/1984 and, in part, directly by the communal administration. Last year a total of 260 people were involved in these schemes, of whom approximately 50 per cent were aged over 40 (almost one fifth aged over 50) and more than 90 per cent had previous work experience but were facing serious difficulties in re-entering employment (80 per cent unemployed for over two years). To coordinate the various workforces, 15 Fiat managers who had taken early retirement were employed.

In mid-1994, administration of these schemes was handed over for the first time to the ICS Consortium (Social Cooperative Enterprises) consisting of 20 social cooperatives, half of which aim to employ disadvantaged people. The reason for entrusting these schemes to an external body was due mainly to the fact that the communal administration wanted to take concrete steps towards the gradual employment of disadvantaged people. Indeed, although this was the project's basic aim at the outset, these schemes progressively became transformed into a simple social benefit disguised as work. Results of research carried out last year reveal that the main aim of the 260 people involved in the project is to obtain stable and permanent work in the scheme itself. To avoid the scheme turning into a mere subsidy for the weakest sector in the employment market, and ensure that, on the contrary, it acts as a real measure to assist re-employment, the Consortium in future aims to:

- reduce gradually the number of people involved in the schemes;
- provide for professional retraining (in particular of the older and least qualified people) by means of in-service company training courses.

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### **3. Local Association (France)**

**1.3, 3.9**

The Local Association provides health and social welfare services through domiciliary visits. No age discrimination applies to appointments and there is no exit scheme available on an age-related basis. Candidates aged 40 to 45 years are in practice preferred to younger applicants. This informal policy of preferring older employees has not resulted in the adoption of any special measures for older workers. Employees who so desire may reduce their working hours to half-time.

The Local Association is incorporated under the 1901 Act, and provides health and social welfare services through domiciliary visits. It receives public finance from the state, from local communities, and from non-government bodies (pension funds, health insurance funds). The Association looks after some 1,300 old people in one Paris borough.

The Association employs 260 staff with varying levels of training. Most are home helps (187), some of whom are holders of the CAFAD Home Help Proficiency Certificate (1 year after the Vocational Studies Certificate). Other staff include State Registered Nurses, and nursing auxiliaries who hold the CAFAS Auxiliary Nursing Proficiency Certificate (1 year after the Vocational Studies Certificate). There are 15 administrative staff. Most employees (90 per cent) are on permanent contracts, but only 40 per cent work full time. The remainder work in excess of half time, so that total hours worked are equivalent to 200 full-time posts.

The Association has expanded continuously since 1978, when it had only 80 staff on shorter working hours. The average age of staff is quite high, 5 home helps being over 60, one over 70, 35 under 30, and the remainder between 30 and 60 years of age. This age structure is a reflection of the Association's somewhat benevolent policy towards ageing workers.

Officially, there is no special policy aimed at them: no discrimination applies to appointments, no scheme available on an age-related basis, and thus no barriers apply to recruitment or departure. Phase early retirement has never been used and is not in any way under consideration. Nor is there any age limit for retirement. One might even get the impression that older workers are given preference during recruitment: candidates aged 40 to 45 years are in practice preferred to younger applicants. This attitude may be explained by the nature of the Association's work. The clientele has an average age of 85 years and, at the level of personal contact, prefers mature visitors whom they trust more readily. Youth is therefore something of a handicap.

This informal policy of preferring older employees has not, nevertheless, resulted in the adoption of any special measures in their regard: no special training or adaptation of their working conditions is conducted by the Association. Employees who so desire may, all the same, reduce their working hours to half-time. Similarly, whilst the Director may have a positive opinion of old age, the fact that the criterion for dismissal is not age but physical ability (2 workers were dismissed in 1994 for lack of physical ability) might be regarded from certain points of view as discrimination, given that the work itself is arduous.

2.2, 2.5,  
3.2, 3.7,  
6.3, 7.4

#### 4. Manufacturing Group (UK)

This organisation's policy towards older workers came out of its commitment to achieve maximum diversity in its workforce. It operates a number of policies aimed at obtaining the optimum performance from employees over the long-term. Thus staff receive appraisals up to the age of 60 and it is common for employees aged in their 50s to go on training courses. The organisation also operates flexibility in its retirement age such that all employees can retire at any age between 60 and 65. The age of entry to the pension scheme has also been increased and part-time workers have been allowed entry.

14 This group of companies manufacture a wide range of products for markets in the UK and elsewhere. These products include animal feed, paper, plastic and glass laboratory products, sales



and servicing of materials handling equipment and plant breeding. The company employ 4726 men and 1091 women.

Its re-orientation towards older workers came about because of skill shortages and a desire to attract and retain the best personnel. Management want to eliminate all discrimination and to allow workers who want to stay on past the retirement age the opportunity to do so, because they have skills the company can use. Management are trying to get the best human resources to meet the needs of the business and believe that the more restrictions they apply, the less flexibility they have.

In terms of recruitment this employer's personnel staff check that line managers are not discriminating against particular group. Management believe that, the narrower the line manager draws the profile, the less the chance of finding a suitable candidate. Older people are included in training courses and the appraisal system. Up to the age of 60 employees are appraised and it is common for people aged in their mid-fifties to be sent on training courses.

This company has also introduced greater flexibility in retirement provision called the 'window of retirement' although this is only from 60 to 65 years and the person we interviewed doubted whether many people would want to work beyond the age of 65. Rather than all staff opting to retire at the age of 60 the company has found that this is rarely the case. This company has also acted to equalise access to company pensions and has adjusted company contracts. All staff, men and women, are contracted to the age of 65 and staff are allowed entry into the company pension scheme until the age of 58. Previously women's pensionable age was 60 and men's was 65, and 55 was the maximum age for entry into the pension scheme. Also the company used to exclude all part timers and this has now been eliminated.

Another policy about to be introduced by this company is weekend working for women, which is specifically aimed at women who cannot work fully through the week but can work at weekends because their spouse is able to care for the children. It satisfies the employer because it gives them a longer production run.

A final policy innovation in this organisation has been the introduction of annualised hours whereby employees are contracted to work given number of hours in a year. Therefore they can choose to work number of days in a row and they have a number of days off work.

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## 5. Insurance Company (UK)

Labour shortages attracted this organisation to targeting older workers. This company does not include age bars in recruitment advertisements and has actively tried to appeal to older people when recruiting. The organisation offers flexible working hours and part-time work to those with caring responsibilities. The organisation has also set up courses in conjunction with a local college aimed at people wishing to return to work. Additionally, it aims to tailor training to the individual needs of the employee.

**1.3, 1.5,  
2.1, 2.2,  
3.2, 3.6,  
7.4**

This company is a provider of insurance and re-insurance services. It employs 266 men full-time, 246 women full-time and nine women part-time.

Older people were identified as potential source of labour when the company had difficulties in attracting sufficient numbers of younger people at the end of the 1980s. It has introduced a range of initiatives to encourage the recruitment of older people. For example, age limits are excluded from the company's recruitment advertisements. Qualification specifications are also excluded or are accompanied by the statement: 'or equivalent experience'. Positive statements, such as 'looking to return to work?' are included to encourage older people to apply. In addition, recruitment agencies used by the company are informed that adverts are not to carry age bars.

The company also operates flexible working hours. Part-time working is available to people whose childcare responsibilities prevent them from being employed full-time. Staff are also encouraged to work on past the state pension age. Prior to these changes, the average age of the workforce had been 20 years. At the time of interview the average age was 30 years.

The company has recruited older men through government training programmes for long-term unemployed people. In addition the company, in conjunction with other local insurance companies has set up returning to work course with the local college. The course has been run twice and 30 trainees have participated. Managers are impressed by the standard of people recruited via this route. The Personnel Department has persuaded line managers of the benefits of recruiting older people by relating 'success stories' of older people who have been brought into the company.

The company is aware that the training needs of an older recruit might differ from those of younger person. It was felt that, because insurance is very computer-related sort of industry, older people, who might never have used computer before, would need slightly more training. However, the company's policy of tailoring of training to an individual's need has meant that this problem has been easily overcome. Confidence building has been an important feature of the support which it has been necessary to provide for some older recruits who have not been employed for extended periods.

1.3, 2.1,  
2.2, 3.2,  
3.6, 6.1,  
7.5

## 6. Department Store (UK)

Older people were identified as a potential source of labour when this organisation was experiencing recruitment difficulties. This organisation does not place age bars in its recruitment advertisements. In addition, workers over the organisation's retirement age are often encouraged to remain in employment. A policy of giving temporary contracts to workers in this situation has also been ended. The organisation has run recruitment campaigns targeting women wishing to return to work. For such workers the company offers confidence building and assertiveness training.



This organisation is a major retail fashion department store employing over 500 people. It employs 108 men full-time, 275 women full-time, 24 men part-time 121 women part-time.

The company identified older workers as a potential source of labour when it was experiencing recruitment difficulties in 1988. Management also wanted to increase the flexibility of their workforce and reduce staff costs. They decided to target older people and to change the ratio of full-time to part-time staff to something approaching 60/40. It was thought that this would greatly increase the flexibility of the workforce.

The company has changed its retirement policy so that, both men and women can retire at the age of 60. A policy is set out in its personnel handbook, that when a staff member reaches retirement age, they may be able to remain with the company. Staff contracts of employment include the statement: 'at the discretion of the Personnel Department', but staff are actively encouraged to remain with the company. In the area of recruitment the company does not specify age bars in their advertisements although, as a rule, they do not tend to recruit after the state pension age. However, on certain occasions people aged up to 70 years have been recruited when it was felt they had particular expertise.

Another policy change has been with regard to contracts of employment. Previously staff who had continued past the state retirement age had been put on temporary contracts which had disadvantaged them in terms of sick and holiday pay. This policy has been changed so that these staff have the same conditions as every other employee.

The company has recently run recruitment campaigns which targeted women returners. This included offering women packages of flexible part-time work, which would suit either women with children or other caring responsibilities or those who might not wish to work a 37 hour week, and the option of only working during term time.

An important feature of the company's policy has been training to enable people to re-enter the world of work after being out of employment for long period of time. This includes confidence building and assertiveness training and familiarisation training for people who are apprehensive about new technology. The company's employment policy also recognises the needs of employees who wish to spend a period of time before full retirement working part-time hours or with fewer duties.

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### **7. Provider of Residential and Health Care Services for the Elderly (UK)**

Traditional difficulties in recruiting younger staff mean that this organisation has always oriented its recruitment activities towards older people. The organisation only uses the state pension age as a guideline. Thus, if physically able, older people are actively encouraged to remain with the organisation. Otherwise the organisation will try to move the employee to a less demanding post. Managers receive training in anti-discriminatory practices and, when

**1.5, 1.7,  
2.3, 2.5,  
3.7, 4.4,  
5.2**

**17**

using recruitment agencies, the organisation requests details of the agency's equal opportunities policy.

This organisation provides private care to older people in residential/nursing care homes, acute care and private hospitals, care to people in their own homes through a domiciliary care agency and of retirement apartments. They employ 865 women full-time, 69 men full-time, 672 women part-time and 70 men part-time.

Traditionally it has tended to recruit older people, particularly married part-time women. Management takes the view that, as the organisation is constantly struggling to recruit sufficient numbers of staff because this area is not attractive to many people, and because of a decline in the numbers of people qualifying as nurses, recruitment procedures must not discriminate against any group because this would restrict the available pool of labour still further.

The organisation does not have a maximum retirement age. The state pension age is only used for guidance purposes and if an individual wishes to continue working, providing they are physically capable of continuing, then this is encouraged by management. If an individual cannot continue in their present job but another job is available that they can do then efforts are made to place them in that job. Management think that this does not just benefit the staff member but also saves the company time and money in recruiting someone else to fill the vacant post. This arrangement is then reviewed on an annual basis via the appraisal system to check that it is still suitable for both parties.

The organisation also ensures that recruitment advertisements and recruitment procedures do not discriminate on grounds of age. It is trying to expand the business into obtaining contracts with health service trusts and health authorities. It was felt that these organisations would expect a contractee to have an effective equal opportunities policy. On a yearly basis job descriptions and person specifications are reviewed to ensure that they are not discriminatory. Managers regularly receive refresher training in recruitment methods and anti-discriminatory practices.

The organisation asks recruitment agencies for details of equal opportunities statement and their policy on older workers. They also ask where advertisements are going to be placed. The organisation are also considering introducing quotas for disadvantaged groups.

Older staff also have a mentoring role with younger employees.

2.1, 2.2,  
2.4, 2.5,  
3.2, 5.2,  
6.2, 7.1,  
7.4

## 8. Clearing Bank I (UK)

This organisation values its older staff because of the continuity and experience they bring with them. Recruitment advertisements do not carry age bars and an age bar on developing staff for senior management positions has been removed. It also offers special leave to carers. The bank is keen to retain the skills of its women employees. It operates a career break scheme with annual updating training so that women can be kept informed about job

changes and what is happening at the bank. A policy guide produced by the bank also makes reference to not discriminating on the grounds of age.

This organisation is major clearing bank which employs 22,698 women full-time, 17,623 men full-time and 10,000 women part-time. Older people are employed at all levels in the organisation. The bank is going through a significant period of change and management feel that older people bring with them continuity and experience and act as the 'glue' to keep the organisation together.

Upper age limits are not included in recruitment advertisements. An age bar on developing people in senior management positions beyond the age of 35 had also been removed. A section of the organisation's equal opportunities statement deals with the issue of age discrimination. In addition, the organisation has in place a measure called 'family leave' to assist carers. This gives staff an extra week's absence from the bank on full pay to care for elderly relatives.

The Bank also has an equal opportunities council which meets every six months. This is a consultative organisation where management and the unions meet to discuss developments relating to policy. Staff are encouraged to make a complaint if they feel that they have been discriminated against. The Bank encourages staff to come forward by making it clear age discrimination is covered by the grievance procedure and that, if proven, this will be treated as gross misconduct.

Staff have been encouraged to leave in the past through the provision of early retirement packages as a means of safe-guarding the jobs of younger people but management now consider this to have been an error. In particular, it is felt that there is an early retirement 'culture' which has built up in the organisation. Although not yet reversed, this policy is now much more tightly controlled with any application needing to go through several senior people for approval. The bank are hoping to achieve any future redundancies which become necessary through natural wastage.

The bank are now seeking to recruit more older people and are examining ways in which older people might be retained for longer and the barriers to retention because they are concerned about there being a considerable skills gap with the massive exit of older people.

Older workers are included in training programmes although senior managers take the view that staff past the age of 50 have all the skills they are ever likely to need. All staff are developed and trained according to their needs which are assessed through the performance appraisal process. Management are trying to get the message across that an individual does have to climb the ladder continuously in order to have a career with the bank, but that staff are expected to develop their skills in the job they are doing.

Recent bank policy had been to recruit more older women on a local basis. The bank employs a relatively large number of part-time workers and has moved to taking more women in the age group 45-60.

Seventy-six per cent of the bank's staff are women. In order to retain women workers the bank has operated, since 1985, a career break scheme particularly to boost the number of women in management positions. The latter allows people up to 5 years off away from the bank and then later on to come back to resume their careers. The bank has a 'priority' returners scheme for management and an 'ordinary' returners scheme aimed at other staff. The returner rate is very high. Women on career break schemes are expected to attend a yearly 10 days of training per year with the bank. Training sessions bring staff up to date with what is happening at the bank and their managers discuss with them what they will be doing on their return. Managers are being encouraged to be flexible initially in the short term so they ease the transition back and to offer returners more flexible hours and the opportunity to work part-time.

In an attempt to educate staff and managers, a policy guide produced by the bank makes reference to not discriminating on the grounds of age. In addition, a code of practice on the employment of older workers which has been published by the Institute of Personnel and Development (IPD), which is the body representing the personnel profession in the UK, has been issued to all personnel departments in the bank.

## 1.3, 1.5, 1.7, 2.2, 3.2, 3.7, 4.3, 4.6, 6.1 **9. Retail Catering (UK)**

This organisation does not include age in its recruitment advertisements. In fact, it has operated recruitment specifically aimed at attracting retired older people. In addition, it has sought to recruit women returners to fill secretarial posts and has offered training to improve their outdated skills. While the organisation's normal age of retirement is 65 it has not been uncommon for staff to stay on until the age of 70. Equal opportunities training for managers covers the issue of age discrimination.

This organisation is involved in retail catering (e.g. fast food outlets). It employs 702 men full-time, 436 men part-time, 1199 women full-time and 660 women part-time. The majority of employees are sales assistants and this is where older workers are concentrated.

The organisation does not include age in its recruitment advertisements. Irrelevant qualifications are also excluded from job advertisements and person specifications. Although the normal age of retirement for men and women is 65 years of age, some employees stay with the organisation until the age of 70. When using employment agencies the organisation will invite a number of them in for a briefing. Part of the function of the briefing is to find out more about the agency, their standards and to ascertain that they are professional and they can meet the organisation's needs. The company's equal opportunities policy is always stressed.

Training is offered to all employees, whatever their age. The company has sought to recruit women returners to fill secretarial posts and has offered training to improve their outdated skills. In addition the company, in conjunction with the Industrial Society, offers training to long-term unemployed older workers and women returners. The company also offers flexible working hours.

20 A large number of staff work reduced or part-time hours.



The company has conducted a recruitment drive which specifically targeted older people who were receiving a pension. The job advert carried the statement: 'The hours you work need not affect your pension entitlements'. The company employed people to stand outside post offices on pension days to hand out copies of the advertisements.

Training and monitoring of managers responsible for recruitment ensures that they are aware of equal opportunities issues. No manager or supervisor is allowed to recruit at any level unless they have attended a training workshop. This covers: how to advertise a job; how a job interview is conducted; legislation; the company policies; and equal opportunities which includes examples of age discrimination. The Personnel Department also conducts audits. These are carried out every three months on every unit. They can involve a member of the Personnel Department sitting-in while a job interview is being conducted. They also involve checking all of the paperwork to do with recruitment. Applications from people who are rejected are held on record, and everybody who is rejected is told so in writing. If a candidate contacts the company to say that they think they have been discriminated against, an investigation is conducted.

Although the personnel officer stated that the company's policy towards older workers was sharpened by a shortage of good quality staff she said too that it has always been accepted practice to recruit the best person for the job. It was also stated that a greater age range brought with it more balanced work teams. The personnel officer said that the company tries to be sympathetic to people with caring responsibilities. For example, they give unpaid leave to staff during school holidays. The company has also revised its policy towards using psychometric tests after finding older people were struggling to complete the tests. They found that this was not because older people could not complete the tests, but rather, the problem was one of self-confidence. After the principle of the test was explained it was found that older workers could complete them satisfactorily.

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## **10. Clearing Bank II (UK)**

**4.3, 7.4**

Age is not included in this Bank's recruitment advertisements and its equal opportunities statement proscribes the use of age when making employment decisions. It is particularly concerned about the issue of the ageing of the population as it relates to caring responsibilities and has developed a number of policies in this area. It operates a career break scheme for women managers wishing to return to work after a break to have children. The Bank also operates a responsibility break scheme for staff who care for elderly dependants. Up to five days emergency care leave is also available.

This major clearing bank employs 30,500 men full-time and 300 part-time, 42,600 women full-time and 14,100 part-time.

While aware of the ageing of the population, the bank are in the process of shedding staff and are not concerned about any potential shortfall in younger recruits. However, the bank are concerned

about the issue as it relates to caring responsibilities among its staff and has developed several initiatives in this area.

Age bars are not included in recruitment advertisements. The Bank's equal opportunities handbook says the following about age discrimination:

Age is a form of discrimination which is not specifically covered by the law, although from the earlier example it can be seen that when an age limit affects a greater proportion of what sex or the other, it can amount to indirect discrimination. There are no age barriers to any position in the Bank, and this should be borne in mind when recruiting, appraising and considering staff for promotion.

The bank has a community enterprises section from where it seconded people to charities. As an alternative to early retirement some employees are seconded to charities on full pay for what can be a substantial period of time before retirement. It also offers a career break scheme which particularly targets women with management potential wishing to return to work after a break to have children. The scheme offers staff with five years' service the opportunity to take a complete break from work or to work on a temporary part-time basis for up to two years beyond the expiry of maternity or adoption leave. During this time staff maintain their grade and status. Staff taking a complete break are required to work for at least two weeks each year. Those working part-time have to work for at least 14 hours each week. All participants are offered full-time employment on their return at the same grade they held before the break. Over 600 staff have participated in the scheme. The majority of these have chosen the part-time option.

The bank also offers a 'responsibility break' scheme for staff who care for elderly dependents. In 1989 the bank conducted a survey of its staff to find out how many had caring responsibilities. It found that half of its staff had caring responsibilities and 38 per cent of these staff were caring for an elderly relative. Staff views were canvassed and the bank introduced several initiatives as a result. These are extended maternity leave and adoption break, job sharing, a responsibility break scheme and emergency care leave. Staff can take time off for a set period and unpaid staff are given assistance in meeting their mortgage payments. The 'responsibility break' allows staff with the personal responsibility for elderly, sick or disabled relatives, to take a complete break from work or to work on a temporary part-time basis for up to six months. The scheme is open to men and women and gives staff with a minimum of 2 years' service the opportunity to negotiate a temporary working pattern to suit both their needs and the needs of the bank. Part-time work can last between 1 and 6 months and, where possible, can continue at the existing work place. During this period existing staff benefits are retained. Alternatively, staff can choose to take an unpaid full break from work for a similar period of time whilst retaining existing staff benefits. Staff return to work after that period at the same grade. Those who are unable to return to work full time after 6 months, are given the opportunity to work on a permanent part-time basis at the same grade. If a member of staff finds it necessary to resign however, then they will be placed on a reserve list for a period of 2 years, and given priority in consideration for vacancies if return to work becomes possible during that time.



Emergency care leave is also available for a member of staff to look after a dependant adult or child. The bank gives up to five days of unpaid leave in addition to annual holiday entitlement or staff can borrow paid holiday from the following year's holiday entitlement.

Mentoring of younger staff is formalised within the bank's performance appraisal system for managers. Each manager has what is termed a 'performance contract' which states that they have a duty to develop their staff. Training is open to all staff, regardless of their age.

The bank operates an early retirement scheme although it is aware that other banks have lost too many valuable staff and so restricts access.

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## 11. Supermarket Chain (UK)

1.3, 2.1,  
3.2, 3.7,  
4.3, 7.4

As well as not putting age bars in recruitment advertisements this organisation ensures that any recruitment literature containing pictures shows a cross-section of its employees. It has run special campaigns to recruit older workers at stores in areas where the population tends to be older. The organisation also offers term-time only contracts to workers. The organisation is aware of the problems faced by those with caring responsibilities and has developed a career break scheme. In addition, employees can retire at any age between 60 and 65.

This private sector organisation is a major supermarket chain. It employs 10,240 men full-time, 6106 men part-time, 8149 women full-time and 39,216 women part-time.

The view of the company was that it is in the interests of employers not to discriminate against any group. The organisation has a maximum recruitment age of 70 years. Training is open to all employees, regardless of their age. The organisation runs an National Vocational Qualification programme which allows employees to complete their training in their own time and to be assessed when they feel that they are ready.

The company does not put age limits in recruitment adverts. They ensure any recruitment literature which contains pictures shows a cross-section of its employees. It has run special campaigns to recruit older workers for specific stores in the country, where the employment profile in that area is more towards the older end of the age range. The organisation has conducted specific campaigns in terms of advertising and supporting literature. The personnel manager stated that the key factor when recruiting these groups is not age but the fact that many might be coming out of retirement or back to work after having raised a family. She stated that it is important to make sure that their induction programme is sufficient to ease them back into work. She added that older recruits might take longer to pick up the new technology and it is important to be flexible and to give them time to do this.

Any recruitment agencies used by the company are sent its equal opportunities policy and are asked to adhere to it. The supermarket chain monitors its recruitment campaigns to check for bias.

Regarding specific campaigns, there is a validation mechanism built into the campaign, in terms of the type of response and why certain aspects of it might have been good or bad. A report is produced on each campaign. Regarding the recruitment process, a record book is maintained at every store. In it every enquiry is logged, whether it is by telephone, personal call or letter. Each personnel manager in a store has the responsibility of logging and tracking every enquiry through to those who are interviewed. This means that the company can check whether any group is being disadvantaged by the recruitment process.

The company is also targeting 'term-timers': who can work full time during the school term, but not in holiday time. The company is offering working rotas, whereby they can do more hours in term time, but then they can drop to fewer hours in holiday periods when they have to look after their children.

The organisation has recognised the issue of the ageing of the population and how this will result in many more people with caring responsibilities for elderly relatives. They have recently introduced a project called 'Life Plan', which is intended to assist employees who wish to put their contract on freeze for a period of time, while maintaining a link with the business. The company has also introduced greater flexibility into its retirement scheme so that both men and women can retire at any age between the ages of 60 and 65 without an actuarial reduction. In addition, once a person reaches the age of 65 or over, then their retirement age for pension purposes found that there are more women wanting to work on to the age of 65 than men wanting to leave at the age of 60.

1.5, 3.2,  
3.7, 3.8,  
4.3

## 12. Wholesaler of Electrical Goods (UK)

An extension of working life beyond the age of 65 is available to staff at the discretion of management. Managers receiving equal opportunities training are told about the existence of age discrimination. The organisation seeks to maintain an age balance among its staff. It also has a policy of flexible working hours. For example, for some jobs recruits are offered 20 hours of work and the flexibility to choose when they work those hours.

This company employs 288 men full-time and two men part-time, 141 women full-time and three women part-time. The company do not specify age bars in recruitment advertisements. The retirement age is 65 for men and women. However, extending working life beyond the age of 65 is possible at the discretion of management and is renewed annually. As long as the job still exists and employees are physically able to do it they are kept on. This policy is outlined in the staff handbook. Company custom and practice in job recruitment is that the decision is taken on a person's ability to do the job rather than being governed by an extraneous variable such as ethnic group or age.

The organisation is in the process of decentralising its personnel processes to individual line managers. Line managers are taking responsibility for recruiting their own staff and the Human Resource Department is in the process of conducting training workshops for them in the selection

of staff. Part of this training involves equal opportunities issues including that of age discrimination. Trainers make the point that, while age is not legislated against in the UK, it exists like race and sex discrimination. Managers are taught about the need to select on ability.

The company is keen to maintain an age balance among its staff because of its previous experience when, with the aim of reducing staff costs, it had a team of 20 younger people working in a warehouse. According to the personnel manager this imbalance had caused the company considerable problems with discipline. At the present the age range is from 20 through to 60 years. Management feel that this is the correct balance. They have found that older people tend to have a mentoring or a coaching role with some of the younger staff. Older staff also help to maintain discipline at the workplace.

The company offers shorter working hours for those older people who wish to do so. It also allows considerable flexibility in the hours of certain jobs. For example, for some jobs recruits are offered 20 hours of work and the flexibility to choose when they work those hours.

The company has criteria for selecting staff for redundancies if these are required. There are four categories: last in first out; a combination of attendance and time-keeping; any disciplinary warnings that may be held on file; and a combination of skills, productivity, attitude. Age is not a factor in the selection of staff for redundancy.

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### 13. Leisure and Retail Group (UK)

**1.3, 2.2,  
3.7, 4.3,  
7.1, 7.4**

As a result of a review of its response to potential labour shortages this organisation has targeted women wishing to return to work but who do not want full-time employment. As well as not carrying age bars, recruitment advertisements have frequently targeted women returners. In addition, employees are able to retire at the age of 60 or continue until the age of 70, subject to an annual medical. Management are sympathetic to the needs of workers with caring responsibilities and work rotas are rearranged where possible.

This large commercial group consists of hotels, betting shops and do-it-yourself stores. It employs 8500 men full-time and 2000 part-time, 9000 women full-time and 7500 part-time. This organisation has conducted an evaluation of its staffing needs in view of potential labour shortages. At the same time it evaluated its staffing needs at times of peak demand and troughs in business. This is a particular problem affecting the organisation's hotels but it is also a problem for its chains of do-it-yourself stores and betting shops. During the review the company identified the sort of person that is available to work at peak times: mothers wishing to return to work who do not want full-time employment.

The company does not specify maximum ages in recruitment advertisements. Recruitment adverts have frequently targeted women wanting to return to work after having children.

When recruiting staff this employer is looking for staff who will fit into a team. A team is made up of staff with a range of experience and a broad age range. Teamwork is an important feature of most of an employee's work activities. Age is not a factor in any recruitment decision. Relevant skills and ability and the capability of being developed are the criteria on which recruitment decisions are made. A recent example of this approach was the recruitment of a 58 year old man into a senior financial position. He was recruited because it was thought that he would fit into the existing team.

According to the personnel manager older staff are more responsive to training to work with customers than younger workers and interpret training well. The company has its own in-house trainers. They find that, while older staff might be more anxious about new technology when confronted by it for the first time, with appropriate training which takes into account their needs they are as trainable as younger staff. Training is available to all although the personnel manager thinks that, in order to gain promotion, a part-time member of staff would either have to work more hours or become full-time. The company does not employ part-time supervisors or managers. Staff are given long service awards after five and ten years.

The company has also introduced greater flexibility into its retirement age enabling men and women to retire at the age of 60 or work on until they are 70, subject to an annual review to ensure they are fit enough to continue. However, they cease contributing to the pension scheme after the age of 65. According to the personnel manager turnover among older staff is much lower. Management positively encourage staff to grow with and remain with the company. Staff in hotels in particular are interested in staying on beyond the normal age of retirement within the company. Apparently this is because work in hotels becomes a way of life. Staff are also allowed to retire early from the age of 50 although on a discounted pension, but few staff have taken this option. Management are also considering the option of introducing a phased retirement scheme.

Senior management will be sympathetic to a staff member who has a caring responsibility. For example, work rotas will be rearranged where possible. This is left to the discretion of local managers who are given a considerable degree of autonomy. However, this high level of autonomy sometimes seems to work against older workers. One department head, for example, does not recruit older staff. Instead he prefers to recruit younger staff straight from school whose development he then oversees. This appears to be tolerated by the senior management.

The organisation is currently involved in making some redundancies. Age is only a factor if an individual is virtually at retirement age and the redundancy package can give them what they would have received had they retired at the age of 65. Usually however age is not a factor. Instead decisions are based on competence and capability.



#### 14. Lift Manufacturing and Servicing Company (UK)

1.3, 2.1,  
2.2, 2.3,  
2.5, 3.7

A prediction that this organisation's skill requirements are going to increase in the next ten years has led to this organisation introducing a programme of training older workers. Workers participate in an industry-wide training scheme for people who repair and install lifts. Most of the training is 'on the job'. Age bars are not included in recruitment advertisements and a statement on age is included in the organisation's equal opportunities policy. The company has specifically encouraged older people to apply in its recruitment advertisements. Women's and men's pension ages have been equalised at 65.

This company employs 936 men full-time and 98 women full-time and 22 part-time. Most staff are employed in skilled manual jobs.

Management believes that, in the next ten years, their skill requirements are going to be high and consequently it has implemented a policy of training older workers. Age bars are not included in recruitment advertisements. A statement on age is included in the company's equal opportunities policy. It exhorts management to discriminate only on ability to do the job. The company has specifically encouraged older people to apply in its recruitment advertisements. For example, an advert placed with a recruitment agency for a secretary to the Managing Director stated that the company was looking for a 'mature person'. The company employ a significant number of older secretaries and prefer to recruit from among older age groups. The company actively seeks to recruit older people to work as lift servicing engineers and employs several aged in their early 60s. According to the personnel and training executive, these employees tend to have a better rapport with the employers whose premises they are visiting. He thinks that older people present more of an image of reliability and maturity which is essential in this industry. One lift servicing engineer recently retired at the age 68.

Additionally, according to the personnel and training executive, in this industry qualifications are as important as qualifications. The company is looking for someone with a 'track record'. Management believe that, if the company wants someone who has worked in the sales industry, has a successful record and is able to sell, this person is more likely to be older. As a consequence, the company employ sales staff aged in their 50s and 60s. The youngest member of the salesforce is aged in their early 30s.

The company has equalised the normal retirement age for men and women at 65 which has formalised what had become customary. However, although management like to retain older people beyond the normal age of retirement, this practice has declined somewhat. According to the personnel and training executive, at a time of recession in the industry, there is 'moral' pressure to make staff retire aged 65 instead of later in order to make jobs available to younger people. On the other hand, the company has recently instigated a programme of redundancies and those who have left the company have tended to be less experienced staff who are usually

younger. As a result, the average age of the company has increased. The company operates an early retirement scheme but few staff take up this option.

The lift servicing industry operates a modular two year adult training scheme for staff who install and repair lifts. This has been in operation for approximately 15 years and leads to craft status. Employees gain experience by working on the job and writing this up. The employee is supported by their immediate supervisor who provides guidance on what jobs the staff member should do in order to acquire particular skills. The employee will work with a qualified lift engineer while he acquires these skills. Progress is assessed at regular intervals by a module assessor and, at the end of two years, if sufficient work has been done, and sufficient variety has been covered, then the assessor will recommend that the employee is put forward for the award. An independent assessor from the industry training body then tests the individual and makes a recommendation. There is no age limit on joining the scheme. A recent 63 year recruit has started on the training scheme. Currently there are 116 employees participating in the scheme. This form of training is relatively inexpensive because it is virtually all 'on the job' and lift servicing engineers usually work in pairs anyway. Practical experience is supplemented by distance learning materials and an in-company video training package which employees can borrow and take home. The latter are accompanied by work books containing exercises that the employee completes and hands to their supervisor for assessment.

Sometimes managers find that older employees struggle to come to terms with technological advances within the industry. However, the company has a vast range of jobs into which an individual can be placed and where a deficiency in skills is balanced by greater maturity. Therefore, it is seldom the case that older employees are made redundant by technological change. In fact, the personnel and training executive expressed one of the advantages of employing older people as being that they can mentor younger staff.

2.2, 2.3,  
3.7, 4.3,  
5.2, 7.1

## 15. Printer and Publisher of National Newspapers (UK)

This organisation believes that having an age balance in its workforce has a stabilising effect on the business. Recruitment advertisements do not carry age bars and recruitment agencies are told not to select on the basis of age. The personnel manager works with managers to convince them of the benefits of employing older workers. A statement on age is included in the organisation's equal opportunities statement. Older workers are included in training programmes. Pension ages for men and women have been equalised at 65.

This international newspaper group employs 2711 men full-time, 24 men part-time, 838 women full-time and 11 women part-time.

This company's policy covers its entire worldwide operation and came out of a decision by management that the company should remove all age restrictions from its employment practices. Senior management believe that an even balance in the age profile of the workforce has a stabilising effect. Older workers are seen as providing a mentoring service to younger employees.



Their experience is regarded as useful in identifying pitfalls in projects and in pointing out approaches to problems that have failed or succeeded in the past. This policy change did not come about because of demographic changes. The company has investigated the issue and does not foresee any significant shortfalls in recruitment.

Previously the company's recruitment advertisements carried age restrictions but this is no longer the case. In addition, recruitment agencies are told that any advertisements for the company should not carry age bars.

A relatively young average age of managers (early thirties) means that it is sometimes difficult to convince them of the benefits of recruiting older people. So the Personnel Manager explains the benefits of employing older workers, to try to persuade them that older workers can be more stable and stay with the firm for longer than younger ones, and has been successful in convincing some managers. As a matter of policy, line managers discuss any vacancies they have with the personnel department and get advice on how to carry out the selection process.

In addition, the pension age for women has been equalised with that for men at 65 years. In an attempt to introduce greater flexibility in the age at which staff retire, the company has also replaced its final salary pension scheme with a money purchase scheme. While most employees retire at 65 a few remain with the company.

The company is going through a period of downsizing and a redundancy policy is in operation. While volunteers are sought first, which leads to greater numbers of older workers coming forward, should this produce insufficient redundancies the company will carry out selected redundancies. Age will not be one of the criteria.

Instead these would be performance over the last few years, skill level and future potential.

Major changes in the way newspapers are produced by the company have not automatically resulted in older workers being made redundant. In fact, the personnel manager said that technological changes have not had an adverse impact on older employees. While he feels that older people may find it harder to adapt to rapid technological change he believes that they are capable of it although it may take them a little longer than a younger employee. The company is prepared to invest in training for what it considers to be reliable and loyal employees. Age is not a factor.

Age has been included in the company's equal opportunities policy. This states that the company will accord equal opportunity in recruitment, training, promotion, opportunities and terms of employment and that, in recruitment, training or promotional decisions the criteria used will be relevant to the requirements of the position. In addition, the company attempts to ensure that no particular group is directed towards or excluded from particular jobs or departments.

**2.2, 3.7, 3.8, 4.3, 7.4** **16. Asset Management Company (UK)**

This organisation believes in the business value of having a balanced workforce. Recruitment advertisements do not carry age bars and staff may be retained past the organisation's retirement age of 60. This may take the form of working two or three days a week while drawing their company pension or being hired as a consultant. Additional leave is available to staff with caring responsibilities. In addition, older people are not discriminated in terms of promotion or training.

This finance company employs 344 men full-time and 285 full-time and five part-time women. Administrative and support staff and fund managers make up the bulk of the workforce. Older people are employed at all levels in the company from Chairman to receptionists.

Management are aware that, with falling numbers of school leavers, it is going to be increasingly difficult to recruit quality staff in the future. The company takes the view that, because of rapid advances in technology, employers have to be prepared to retrain people and that employees are likely to have two or three careers within the organisation.

The company does not specify maximum recruitment ages in job advertisements. It recruits on the basis of individual skills and how these match the person specification for the job they are seeking to fill. In addition, some staff, with the company's permission, carry on in employment beyond what is the normal retirement age in the company of 60 years for both men and women. In some instances staff are offered the option of taking their pension but still working for two or three days a week while others retire and are employed as consultants.

Management are aware that some staff might have caring responsibilities other than childcare and allow staff periods of additional leave if required.

Older staff are not discriminated in terms of promotion or training although training is less likely to be offered to someone nearing retirement age. In the words of the the personnel director: 'we want all our people to be highly trained because they are the asset of the business'.

Management believe that it is important to have a balanced workforce consisting of a mixture of younger and older employees. The personnel director believes that a strong desire to learn and the energy of young people is balanced by the knowledge and experience of older employees. In addition, older workers have an image of reliability and stability which is important in dealing with certain customers. He believes that it would be impossible to run the business without a mixture of younger and older staff. In his words:

If you're presenting to a firm of US trustees particularly, they could be in their 70s. There's no point in turning up with a 25 year old who's actually running the money. You've got to turn up with a fund manager who's a minimum of about 55 years of age and been in the business 30 years as well.



## 17. Provider of Business Information and Computer Services (UK)

1.3, 2.1,  
2.5, 3.7,  
3.8, 4.3

This organisation is keen to obtain a return on its investment in staff over the long-term. It does not include age bars in its recruitment advertisements. Its equal opportunities statement includes a statement that the organisation does not discriminate on the grounds of age. It is particularly keen to recruit a greater number of older people to its sales force on the grounds that this will provide greater credibility with customers. Retention is a particular feature of this organisation's employment policy. Thus, retired staff are reemployed during peak business periods. In addition, the organisation has embarked on a recruitment drive where it is trying to recruit returners to work on short fixed-term contracts.

The private service company employs 1371 men full-time and five part-time, 820 women full-time and 75 part-time.

The organisation is American owned and follows its parent company in taking the view that age is not a relevant factor in employment decision making. The company do not put age bars in recruitment advertisements and is seeking to increase the number of older employees. While the normal age of retirement in the organisation is 60 an increasing number of staff are wanting to work beyond that on an associate basis for the company - coming in during peak business periods. This applies particularly to trainers.

According to the personnel manager it is in the interests of knowledge based industries to retain their staff for as long as possible. The company takes the view that, as it spends a lot of time on staff training, it is important that it encourages staff, for example women on maternity leave, to return to the company. The company are about to embark on a recruitment drive where they are trying to recruit returners to work on short-term fixed-term contracts.

The company's equal opportunities code includes a statement to the effect that it does not discriminate on grounds of age.

The company are keen to recruit older people into their sales force as it believes that this gives them greater credibility with customers. Such staff will often have been made redundant from other sales jobs.

The company experiences difficulties in attracting project managers who are capable of running large multi-million pound projects. Such people are usually in the 35 - 50 age range. In an attempt to overcome this shortfall it is in the process of improving the management skills of existing managers. It is introducing a new performance appraisal system, career structure plans, and is reviewing job descriptions so that they develop career paths for staff in whom the company are investing considerable time and money.

Although line managers take the final decision on recruitment, control over the process is maintained because all recruitment is monitored by the personnel department.

Some employees are given the option of working on past the company's normal age of retirement. This arrangement is reviewed on an annual basis. The company favours an age mix in work teams for the stability and sense of continuity this provides. Thus teams will typically consist of young graduates and older staff who have been with the company for many years.

1.3, 1.5,  
2.2, 3.7,  
5.2, 7.4

## 18. Child Care Charity (UK)

This organisation has traditionally tended to recruit older people. Men and women can retire at any age between the ages of 60 and 65 and a small number are employed beyond the age of 65. A statement on age is included in the organisation's equal opportunities statement. It also operates a leave for carers policy which allows staff to take short periods of leave in addition to their annual leave to deal with emergency situations.

This non-profit-making organisation employs 295 men full-time and 25 part-time, 469 women full-time and 322 part-time. The majority of staff work in professional and administrative jobs. A large proportion of staff are aged over 50.

Management are aware of the issue of falling numbers of school leavers. However, historically, the charity has not recruited large numbers of school leavers and have, therefore, needed to modify their recruitment policies. It has always recruited evenly across the age range. Age is not included in recruitment advertisements.

Flexibility in the age of retirement is possible. Men and women can retire at any age between 60 and 65 years. A small number of staff are also employed beyond the age of 65 in exceptional cases. The personnel director is aware that some staff who find their job particularly satisfying might wish to work on past the normal age of retirement. He feels that such staff can still make a contribution to the organisation.

Management believe that older people bring with them a considerable amount of life experience which is very valuable in an organisation such as this. According to the head of personnel, training is available to all staff and, while they have found that some older people have failed to adapt to the introduction of new technology, just as many have 'risen to the challenge and found it very exciting'.

Age is included in the organisation's equal opportunities statement as are other characteristics which the charity consider to be irrelevant in recruitment and training decisions. Ability to do the job is regarded as the sole criterion. Line managers are being trained in recruitment and selection techniques and equal opportunities issues are raised within that training. Management is also planning some equal opportunities awareness raising sessions which are broader than what it offers for staff involved in recruitment and selection in order to get the message across that the charity does not want artificial barriers to the career progression of staff.



The organisation operates a leave for carers policy. This allows staff to take short periods of paid leave to deal with emergency situations. It is additional to the staff's annual leave entitlement. It is mainly used by staff with childcare responsibilities but staff who need to care for an elderly relative, for example, are not excluded.



## 19. Local Authority (UK)

2.1, 3.2,  
3.8, 7.4

Age bars are never included in this local authority's recruitment advertisements and age figures in the organisation's equal opportunities statement. The organisation does not have a carers policy as such but special paid leave is available at the discretion of managers and can be applied in the case of supporting staff with caring responsibilities. The organisation also operates flexible working hours.

This organisation has responsibility for providing services in a central London borough. It employs 2764 men full-time and 265 part-time, 3323 women full-time and 1100 part-time.

Management do not believe that they face a significant problem with recruiting staff due to recessionary pressures and a general downsizing of the workforce. The issue of demographic change was looked at by the management but they do not consider that it will affect the council's recruitment practices for the foreseeable future. However, policies have been developed which have the effect of assisting older workers although this appears to have been as a byproduct of an attempt to recruit and retain women workers. In addition, when it has had a problems retaining staff in the past, the council has introduced various retention measures. These have included salary supplements, retention bonuses and uprating of pay scales for particular groups of staff

Age bars are never included in recruitment advertisements and age figures in the organisation's equal opportunities statement. The normal age of retirement within the council is 65 for both men and women and the vast majority of staff retire at this age. Staff at all levels continue to receive training past the age of 50.

The authority has a policy of enabling women who took maternity leave to return to their previous job within a year and pays a child care allowance for 6 months.

The authority does not have in place a care leave policy as such but it does offer paid special leave which is available at the discretion of the chief officers and can be applied to staff with caring responsibilities.

The authority also provides flexible working hours. There are core hours of 10.00 a.m. to 4.00 p.m. Staff can accumulate an extra day off each month and this can assist those with caring responsibilities. However, Chief Officers in each department do not have to operate this policy, which can lead to anomalies with staff moving between departments.

The personnel manager felt that although age would not be a barrier to promotion for someone in their 50s it would become a significant factor for someone in their 60s nearing the age of retirement within the council.

The council is making redundancies at present and management is aware that, while some older people might have fewer commitments and so might experience redundancy as less of a shock, others who wanted to continue working would face serious difficulties in the labour market. Thus older employees are not specifically targeted, although volunteers are sought and those coming forward tend to be aged 55 or over. Early retirement is available although this is usually utilised only in the case of staff who have health problems.

## **2.1, 2.2, 4.3, 6.3 20. Electrical, Mechanical and Data Wiring Installation Company (UK)**

As an organisation which has traditionally recruited large numbers of school leavers, this organisation is acutely aware of the problem of falling school leavers. To counter the problem the company has participated in a scheme to recruit adult trainees to fill engineering jobs. Trainees attend college on a day-release basis. The organisation does include age bars in recruitment advertisements and some employees work on past the normal retirement of 65. Older workers are not excluded from training programmes.

This private company employs 1350 men full-time and one part-time, 58 women full-time and 19 part-time. This company has its head office in London but also operates outside the UK.

Management consider themselves to be aware of the issue of the ageing of workforce which has been widely discussed in their industry. The company first became aware of the issue at the end of the 1980s.

The company recruits a considerable number of younger apprentices and is concerned about how demographic changes will affect this recruitment in the future. For example, in a typical year, the company will recruit 40 apprentices in the London area alone. To counter this problem the company has participated in a scheme to recruit adult trainees to engineering jobs. These staff were recruited directly from college where they were undertaking training and given jobs in the company. They came from a range of employment backgrounds. While employed by the company recruits attended college, sometimes on a day-release basis. They could either go through the course and eventually become qualified as an electrician, or they could stay as an adult trainee for the rest of their career. A few decided on the latter, but quite a few continued through training and are now qualified electricians. The age range of recruits was from 28 to 50 and recruits have included a small number of women. The programme is monitored by the company's training officer who provides progress reports on each of the trainees.

The scheme was instigated by the Electrical Contractors Association in conjunction with the Joint Industry Board and was sanctioned by the trade unions. Unions have participated in the introduction of the scheme and are fully behind it. Individual employers decided whether they



wanted to participate. The scheme was well supported by employers within the industry. Management staff think they have had good results with this scheme. Most of the recruits have stayed with the company.

As a byproduct of this scheme the company has found that it has recruited staff with a more mature and responsible outlook than the traditional apprentice who has come straight from school. In addition, the existing workforce has not been threatened as these recruits have gone into semi-skilled jobs following the scheme. Moreover, management believe that they have made cost savings in recruiting people who will stay with the company for much longer than previous younger apprentices who have waited until their training was complete and have then moved on. Overall management consider the scheme to have been a success although no systematic evaluation has been carried out.

The company will consider recruiting an individual up to the age of 65. For example, they recently recruited a 65 year old surveyor. Similarly the company recruits electricians aged in their late 50s.

The company do not include age bars in recruitment advertisements. Older people have not been targeted for redundancies which have occurred recently. A few older people stay with the company past the normal company retirement age of 60 and work on until they are aged between 65 and 70. Management are happy to discuss options with staff when they reach normal retirement age. Management see a benefit here in terms of continuity. For example, certain contracts may last four or five years and it is beneficial to a company if a single surveyor is involved from the beginning to the end of the contract rather than having to hand the contract over to someone else.

The company utilises recruitment agencies and these are made aware that it considers older people to be employable in any part of the business. In fact the Group Services Manager believes that, in certain areas such as accounts, older people are much more thorough in their work and tend to stay with the company longer.

Management do not consider that staff are made obsolete by technological change. Age is not a consideration in staff training. For example, the company recently installed a CAD system in an office and retrained draughtsmen and tracers to use it. One of these members of staff was aged in their late 40s.

The company is currently making redundancies. However, older people are not being targeted. If a job comes to an end it is that individual who is made redundant. The company does not operate an early retirement scheme.

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### **21. RAPID - A company employing older skilled metal workers (machine operators) (Sweden)**

**1.3, 4.3**

This medium-sized company has focused on recruiting a small number of older workers both to ensure an age mix and in response to shortages of skilled labour.

RAPID is a medium size company in Bredaryd, a small community in the countryside of Southern Sweden. RAPID develops, manufactures and markets granulators that convert various types of plastic waste products into high quality granules, suitable for recycling. The company has 190 employees in all, of which two-thirds are shop floor workers. In the early 1990s the company cut back in personnel and production. In 1994 and 1995 the company expanded again and had to employ new workers. Of the workers that were recruited seven were over 50 years, some even close to 60.

According to the personnel manager there were two reasons to employ seven persons over 50 years. First, the philosophy of the company: 'The aim of the company is to have a mix of age-groups, qualifications, cultures and competencies. Qualification and experience, not age has been the main criterion in selecting new personnel.' Secondly, availability: the machine operators have to be well trained to master certain techniques and they are in fact hard to get hold of. In Bredaryd a couple of firms closed down in the recession of the early 1990s - therefore there were a number of unemployed, fully trained and experienced machine operators in the community, and they were also over 50 years of age. These were the men that were employed by the company.

Suitable qualified personnel was locally available - and age was not used as a strategic negative selection criteria. In contrast age was seen as a positive factor in terms of the age balance in the company.

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### 1.3 POSITIVE DISCRIMINATION

#### 22. Clothing Manufacturer (Greece)

This organisation's preference for older workers is partly explained by the fact that, in line with an agreement by the state for this manufacturing sector, the same salary is payable to all employees after three years and it is irrelevant how long they have been with the company. The organisation prefers older workers on the grounds that they are more productive, willing and experienced. The company has no difficulty in recruiting people over 50 years of age.

This medium sized private Greek firm is managed and run entirely by the owner who makes all decisions and has no other managers. It is in the very traditional sector of manufacturing household linens and ready made clothing. It is located in Athens and Patras and employs over 200 people, 80 per cent of whom are women. Approximately 50 per cent of its workers are over the age of 50 years and a number of these have been with the company since it started in 1970. The two factories work one or two shifts and part time work is not considered feasible since every machine needs to work for 8 hours.

The employer's preference for older workers is partly explained by the fact that in line with an agreement by the State for this manufacturing sector, the same salary is payable to all employees after 3 years and it is irrelevant how long they have been with the company. So whether 9 or 25



years with the company everyone receives the same wages. Thus there are equal opportunities for all and the employer clearly does prefer older workers. The company has no difficulty in recruiting people over 50 years of age.

Their experience with young people is that those coming from Higher Technical Colleges (TEIs) and private technical schools want to be staff employees and work in the offices rather than shop floor workers. Thus older workers are not easily replaced. In the offices when the computers were installed the personnel in the Accounting Department (10 people of all ages) were given 2-3 hours of lessons and then just started using them. The company has no programme of continuous training or general education. The experience of the company is that for the new machines it is much easier for experienced workers and machinists to learn them since the changes being introduced are not very large. The machines are very expensive and to replace them with the most up-to date new technology would be very expensive, so the company tends not to buy these.

While this company does not demonstrate a positive set of initiatives for the employment of older workers nor can it be considered outstanding and worthy of imitation by others in terms of its employment practices it is the case that it chooses to employ older women as more productive and willing than younger workers. Thus since older workers cost the same as younger workers, though they are more experienced, they are in a relatively better position in this section of the labour market.

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### **23. Crotex (AE) Greece**

**2.2, 4.3**

The organisation does not tend to recruit those aged over 50. However there are exceptional cases such as where a job requires specialist knowledge. There is no age discrimination in job training. Training is provided until the employee reaches pension age. The organisation looks favourably on requests from employees to stay on past the normal age of retirement.

Crotex (XROTEX) AE is a privately owned Greek firm manufacturing paints and varnishes. It started in 1945 and in 1993 ranked 117th in the list of the 200 most profitable Greek enterprises, with profits of 753 million drachmas and currently employs 270 people of whom two thirds are men and one third women. 170 employees are in the company's factory in Aspropyrgos, Attiki, and 11 in the new and expanding factory in Volos. They have shops and distribution centres in Athens (50 employees), Thessaloniki (15) and Patras (10) while they have a small sub section in Bulgaria employing one person.

Virtually all the personnel are employed full time with the exception of some women cleaners and a woman telephonist who at her own request works 6 hours daily. The composition of the personnel includes all age groups and includes those over 60 years of age. They do not employ normally any foreigners since most do not have a work permit; they have one Syrian married to a Greek and with a work permit and one Greek Muslim.

The company does not take on those over 50 years of age, like other firms, and prefer young people who will be trained within the company and identify themselves with it. However there are exceptional cases where they have taken on those over 50 years of age such as people with specialist knowledge, or in the case where they want labourers where the work requires neither special knowledge or is particularly difficult. In general they have a low labour turnover which is the result of the employees receiving good salaries and conditions of work.

In relation to training all the employees of the company are trained without any age discrimination. In relation to training the opinion of the employees is taken into consideration as to the specific needs for training and particular weight is given to the opinion of older workers because of their extensive practical experience often going back 30 years. There is continuous training for all those in the factory and their shops which is mainly undertaken by the relevant managers and departmental heads. Staff of the company also take training courses externally every year which is mainly provided by external training bodies such as ELKEPA and EEDE. In-company training is provided every year and approximately 100 people of all ages undertake this. Such training is provided right up until pension age.

The company looks after its older staff and thus if for some personal reason they don't wish to leave their job when they qualify for their pension they can keep them on. Thus they currently have two pensioners working ; one employee said he would feel useless if he left work and another wanted to remain working in the company for economic reasons because he still had children who were studying; the company was able to oblige and fulfil their wishes because they were 'their own people' after so many years of working with them.

#### **24. Bauxite Parnassos AE (Greece)**

In recruiting managerial staff it is not unusual for this organisation to take on workers aged over 50 years. For such workers there is no barrier to their continued development and career whatever their age. In fact, some workers have remained with the organisation up to the age of 70 years. Provision of training is unrelated to age.

Bauxite Parnassos AE is a company involved in the mining and processing of bauxite and in metal manufacturing and ranks 165th amongst the first 200 Greek enterprises with profits in 1993 of 8,554 million drachmas. It is a Greek privately owned group of Companies formed of two subsidiary companies. It currently employs 870 people, 770 men and 100 women. The overwhelming number of men is explained by the company's involvement with mining. Over 25 per cent of employees are over 50 years of age. The respondent from the personnel department also sits on the employers side of the Joint committee concerning age discrimination. As a company they consider themselves sensitive to the human factor.

While the company cannot be said to have any specific policy for older workers, in general it is not usual for them to make older workers redundant. Since the company is involved in mining this is counted as very hard work from the perspective of insurance contributions and workers can

leave at the age of 50 having earned a full pension from IKA. Thus most workers prefer to stay underground even though the work is heavy so they can finish their contributions sooner; - thus at this level of employment there is no real way that as they get older they can be moved to 'softer' jobs.

In recruiting managerial staff it is not unusual to take on persons over 50 years of age. However in hiring drivers they prefer younger people. The nature of the work in the mines has to be considered a special factor. This leads the company to take some decisions according to the special needs of their workers in this kind of work. At one point a need to reduce personnel led them to introduce a programme of early retirement as well as a programme for younger workers to leave. Thus their age span now is quite limited and tends not to include many older workers. However the nature of the work in the mines has to be considered a special factor.

At the staff level the situation is different. They have taken on some young people in the Group since they can be developed within the company. However they don't discriminate on the basis of age and do take on people of over 50 for some jobs. Thus the General Director recently taken on was over 50 and preferred to someone in his 40s.

While it is not relevant to look at careers for the manual mining workers, for those employed in higher positions there is no barrier to their continued development and career whatever their age. Within the company they have two people who have stayed on and are now both over 70 years of age. However this is at the highest level of employment and reflects their capabilities and knowledge.

Training - the company does train but with respect to the particular job. Thus all drivers whatever their age are trained.

They have a very specific work environment and no particular action on ergonomics.

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### **25. Klostiria Naoussis AE (Greece)**

This local employer is sensitive to the needs of its employees and, since it is the biggest employer in the area, recognises that it has important social obligations. Thus even when the company has to deal with a non productive, non profitable department or group of workers, it develops measures which will lead to increased productivity rather than dismissing workers. Tailored training programmes are provided independently of age. In the case of an individual with health problems they may be moved to a job with a lighter work load.

Klostiria Naoussis AE is a traditional industry involved in producing textiles. It is a private Greek company owned for several generations by the same family and in its current legal form since 1963. It ranks 51st amongst the most profitable 200 Greek companies with profits of 1,412 million drachmas while it is 86th in terms of sales in 1993 of 16,683 million drachmas. Within enterprise 700 people are employed with another 400 in subsidiary companies, all located in Western

Macedonia. A further 40-50 people are employed in the offices of the central administration which is in Athens.

Amongst the total of those employed, who are all Greek, approximately 60 per cent are men while 10 per cent of all the personnel are 50 years of age and over. Older people are in the higher positions in the company. There is no part time employment though they do have seasonal employment for about two months yearly.

While the company does not have any specific policy for older workers, it does give them the possibility of leaving their job if they so wish with full compensation. However despite the downsizing of the company that has taken place it does not push older workers out who wish to stay. They are sensitive to their employees and since they are the biggest employer in the area they obviously create strong social relations with their employees. Within this context even when the company has to deal with a non productive, non profitable department or group of workers, it develops measures which will lead to increased productivity rather than dismissing workers. The majority of employees leave at around the age of 65 years, when they have completed the necessary contribution years or insurance stamps for their pension.

They provide training to all their staff independently of their age, and this is mainly in company training and relates to new technology. Older workers don't have any difficulties in following this training since it is designed in relation to the subject of their work. Between 1990-94 virtually all the personnel participated in some training programme.

In the case of an individual with health problems who can't give his services in the job position which he carries out the company provides him with the opportunity of continuing working in another job situation with a lighter work load.

In the case of someone of 45 and over there is no difficulty in them continuing their career.

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## **26. National Association of Associated Remploy Centres (Italy)**

The main aim of these centres is to provide guidance for women aged over 25 on the unemployment register to find work using training methods based on professional reskilling and techniques to develop motivation.

Set up in 1992, by 1994 the Association of Remploy Centres (CORA) had 27 centres spread over 14 regions, with more than 60 staff. The Association is registered with European Work Action (EWA) in Strasbourg, an umbrella organization for all the re-employment centres operating throughout Europe. The first Italian centre inspired by the 'Remploy' methodology was formed in 1986 in Milan at the initiative of a group of women undergoing professional retraining. This was followed by a further 13 centres of which some were managed directly by public authorities (provinces and communes) and others by private bodies.



The main aim of the centres is to provide guidance for women aged over 25 on the unemployment register to find work using training methods (classic REW modules) based on professional reskilling and techniques to develop motivation. The REW modules, which may be followed subject to a personal interview, last on average 100-120 hours and take the participants through an orientation course in the following stages:

- stimulation and critical assessment of each individual's attitudes, interests, aspirations and assets;
- awareness of the changes and current characteristics of the labour market and the professions;
- acquiring the skills to seek employment;
- preparation and presentation of a hypothetical career plan;
- appropriately planned training measures based on the individual skills required followed by periods of in-service company training;
- integrated modules in the field of computers, communications, self-employment and languages.

The majority of REW courses are free being financed by public authorities. Since the end of 1993 when the centres were set up, 229 classic REW courses have been held (career guidance for women aged between 25 and 55) involving a total of approximately 4000 participants. Women aged between 30 and 45 have made most use of these courses (approximately 62 per cent of the total number of participants). While career guidance for women is still the main activity of the centres, other initiatives have been started up recently such as specific vocational training modules (involving more than 1000 participants) and orientation modules aimed at specific female groups (young women, ex-drug addicts, ex-prisoners, etc. involving more than 20,000 participants).

Apart from the aims and methods of the REW centres, which have been around for some time and are therefore not particularly original, the most interesting aspect of CORA is its ability, as a result of its wide-ranging relations established over the years, to stimulate various institutions (ranging from ministries to regions, provinces and communes, different kinds of associations and trade unions, etc) at different levels (international, national and regional) to take an interest in and pay attention to the problems of female employment.

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## **27. Centre for Integrated Mobility Services (Italy)**

**2.1**

The Centre for Integrated Mobility Services (CESIM) deals with the re-employment of older workers made redundant prematurely as a result of company restructuring. The basic idea behind the initiative is to assist job-seekers through individualized re-employment courses under the supervision of tutors accompanied by training measures where these are considered necessary. Although the Centre's activities are not subject to any explicit age requirements, they are essentially intended for older workers.

**41**

Taking the lead from three companies with expertise in company training and consultancy based in Lombardy (Sys-Dat Consultancy, Fidia and Simki), CESIM went into action in 1994 in the city of Bolzano with financial backing from the Independent Province of Bolzano where a number of large industrial companies were facing difficulties, while a number of vibrant SMEs were able to absorb redundant older workers.

With a staff of nine (7 mobility workers, 1 secretary and 1 part-time employee) during the initial period of activity from January to May 1995, the Centre dealt with some 200 workers, with an average age of 44 (up to a maximum age of 60) most of whom were poorly qualified (more than a third were general labourers). To date, about 35 per cent have been re-employed, while another 5 per cent are about to start up business on their own. The remaining 60 per cent are still on specialized training courses which they need to follow to make up for their lack of qualifications. Nearly all these people are over the age of 50 and, according to the Centre's staff, re-employment is more difficult for them because of their low level of professional skills and rigid attitudes. For this group, the Centre has specifically made provision for constant personal assistance even after the training stage, in order to help them reintegrate into the workforce.

It is too early yet to give a detailed assessment of the results obtained. The initiative's main value is not so much the instruments and methods used to relocate the older workforce, but rather:

- a. the fact that it represents one of the few private schemes (as well as public) at national level geared to these ends;
- b. its capacity to raise the awareness of local authorities (specifically the Independent Province of Bolzano), with respect to this problem and
- c. the attempt to provide an industrial relations measure involving all sectors in the region (public authorities, social partners, individual companies).

## **1.4 SUPPORT FOR SELF-HELP JOB PROMOTION**

### **1.5 28. Social Enterprises in Lower Germany - business start-up scheme and job placement for older long-term unemployed (Germany)**

These social enterprises are set up on a permanent basis and are designed to create jobs for groups including older unemployed people. At least 50 per cent of an enterprise's employees must be on permanent job contracts and all workers must be paid in accordance with current collective agreements or the going rate for the job. In addition, they are not subject to the constraints imposed on other job-creation schemes which insist that employment is restricted to supplementary work and/or an activity in the public interest. They are structured like other normal companies and geared to comply with normal commercial practices. Training is provided to help the enterprises become more or less commercially viable after a five-year period. A subsidy is paid and is reduced over a period of time.

As part of efforts to combat long-term unemployment the Land of Lower Saxony has developed a new and innovative instrument of active employment policy. Since 1991 it has been promoting what are known as Social Enterprises which are commercial businesses designed to secure new employment opportunities for the hard core of unemployed. As the programme has been implemented through a variety of agencies the comments below are restricted to the objectives and results of the programme.

In contrast to instruments which have previously formed part of an active employment policy the social enterprises are set up on a permanent basis and are designed to create permanent jobs for specific target groups. It is targeted at the hard core of long-term unemployed including in particular older persons. As far as this target group is concerned social enterprises are intended not only as a bridge between unemployment and regular employment but as a form of start-up business. For this reason they are structured like other normal companies and geared to comply with normal commercial practices. The vocational training conducted within the enterprises and the accompanying aspects of educational sociology are designed to help the enterprises become more or less commercially viable after a 5-year development period at the end of which no further subsidy would be required.

At least 50 per cent of the employees of Social Enterprises must be on permanent job contracts and all workers must be paid in accordance with current collective agreements or the going rate for the job in the relevant area. In addition they are not subject to the constraints imposed on other job-creation schemes which insist that employment is restricted to supplementary work and/or an activity in the public interest. Similarly enterprises do not have to be non-profit-making. Funding for these Social Enterprises has come from European Union funds, the German Federal Employment Service, the Land of Lower Saxony, local authority funds and self-generated income. The subsidy is on a reducing scale and is based on the assumption that in the first three years an enterprise can generate sufficient revenue to cover 30 per cent of its allowable costs.

In 1994 there were 53 Social Enterprises in Lower Saxony supporting a total of 751 long-term unemployed, 479 male and 272 female. More than half - 53 per cent - of the employees are aged over 40 with just under half - 45 per cent - male and just under a quarter of the female employees - 23.4 per cent are over 50. In addition many of those in Social Enterprises have not completed a vocational training or are disabled.

Two-thirds of the Social Enterprises are GmbH [private limited companies] and 75 per cent of all employees are on permanent job contracts. The Social Enterprises represent a wide range of small and medium-sized companies, the most common size being between 13 and 18 employees. More than one third of all enterprises are involved in the service industry, predominantly catering and commerce. Just under a fifth of all Social Enterprises are involved solely in manufacturing and processing, eg the manufacture of small pieces of furniture and metal construction. Very few are in primary industries and those which do exist are in countryside conservation and market gardening. The average self-financing rate is 34 per cent. The self-financing rate for enterprises who have been in business for more than 2 years is very much higher at 55 per cent. At the time

of the study none of the enterprises had been in existence for the full period and an assessment of the number transferring to normal company status cannot, therefore, be made. In total 22 employees have changed to permanent jobs in other companies.

An analysis of the age range of employees in Social Enterprises shows that in contrast to other instruments which form part of an active employment policy this scheme has managed to include a larger number of the target group of older unemployed, even though the percentage of older females is still unsatisfactory. At the same time the scheme is allowing employees to return to the normal employment market as Social Enterprises become increasingly self-financing as the scheme progresses or transfer to the free-market area.

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## 29. IBM-Sernet (Italy)

This organisation was established in partnership between a group of IBM managers aged over 55 and the company. It offers consultancy services to companies. IBM had the following aims: to retain the high level of professional skills attained; to enlarge the range of services associated with the IBM culture; to achieve greater cost flexibility by contracting out functions not particularly linked to the company's core business; and to provide employees who had worked for many years with the possibility of gradual retirement. Structured permanently on a small scale, with only three administrative staff, the company is based on a network of consultants who work on specific projects and not necessarily exclusively for Sernet.

Sernet is a company that was established in 1991 in partnership between a group of IBM managers (aged between 55 and 65) and IBM itself. It offers to companies of all sizes and in every sector professional and consultancy services by means of a network of specialist consultants with many years' managerial and professional experience.

The project was launched in the early 1990s on the initiative of IBM with the aim of achieving greater cost flexibility by contracting out functions or parts of functions not particularly linked to the company's core business. In addition to cost flexibility, it had the following aims:

- a. to retain the high level of professional skills attained;
- b. to enlarge the range of services associated with the 'IBM culture' available on the market;
- c. to provide employees who had worked for many years with the possibility of gradual retirement thereby avoiding the double shock of sudden and complete retirement.

This led to about 10 highly qualified managers with many years' work experience setting up the Sernet company in which IBM holds a share (initially 34 per cent and currently 10 per cent). Structured permanently on a small scale, with only three administrative staff, the company is based on a network of consultants (about 40 people in all including the co- partners), who work on specific projects and not necessarily exclusively for Sernet (each of whom is therefore an independent professional). Following the initial phase of almost complete dependence on the



mother company, which guaranteed the success of the newly formed company in the first three years, Sernet is currently attempting to consolidate its position in the market as an independent company by:

1. further expanding the number of partners involved; this involves taking on consultants, not necessarily from IBM, whose professional qualifications and experience are competitive in the marketplace;
2. developing a new company operating in specific sectors with a view to developing a network of associate companies dealing with specific areas.

Generally speaking, this is certainly an innovative project in Italy. While its scale is limited, the project is of interest insofar as it attempts to extend the working life of employees while simultaneously avoiding the wastage of professional skills and experience gained over years of work. Proof of this is the frequent contact with young people in various companies either on a consultancy basis or as a result of the agreement signed with the Autofaver consortium to develop new products in the field of quality systems with the participation of numerous students and trainees from the State University and Polytechnic of Milan. The main limitation of this initiative is that it would not appear to be generally applicable to employees with limited professional skills.

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### **30. Zanussi (Italy)**

**1.2**

This organisation underwent massive restructuring in the late 1980s. However, instead of offering incentives for early retirement it preferred forms of professional outplacement for surplus staff, regardless of their professional position and age. Management provided financial assistance for the employees involved (paid leave, reimbursement of travel expenses for interviews or training courses, reimbursement of removal expenses), provide assistance for the new employer (professional training for the new employee paid for by Zanussi for one month), and provide assistance to set up in private business (support in drawing up a business plan, identifying specialized services, special training at Zanussi's expense, financial support in starting up the activity depending on the complexity and quality of the project).

Zanussi is a leading company in the domestic electrical appliances sector. Founded as a family company in 1916, it had 17,000 employees distributed among several plants in the years 1961-1971. In the 1970s it met with its first setbacks and was eventually taken over by Electrolux in 1985. The company's restructuring in the second half of the 1980s involved gradual downsizing in the various plants with the loss of more than 5000 jobs in about three years.

The most interesting aspect of the Zanussi case concerns the way in which the restructuring process was carried out as characterized by the two following basic points:

1. the major involvement of trade union representatives (decision to carry out the restructuring not 'against' or 'without', but 'together with' the trade union);

2. the absence of any discrimination against weaker sections of the workforce, particularly less qualified and older employees.

As regards the first point, the Zanussi model of industrial relations (based in particular on the agreements of October 1991 and July 1992) represents from the Italian perspective one of the most innovative participatory systems of cooperation between management and trade unions (to date it constitutes an important reference point for other companies).

As regards the second point, which is a direct consequence of the first, during the restructuring process the company followed procedures different from those generally employed in Italy at that time (incentives for early retirement, temporary unemployment benefits, etc), preferring forms of professional outplacement for surplus staff, regardless of their professional position and age. As a result of the agreement between the company and the trade unions signed in December 1990, 162 people (54 per cent male and 46 per cent female) with average or below average educational qualifications (over 60 per cent with only lower secondary education) and all aged over 30 (85 per cent over 40 and 34.5 per cent over 50) were relocated. The initiative was based on the company's commitment to provide financial assistance for the employees involved (paid leave, reimbursement of travel expenses for interviews or training courses, reimbursement of removal expenses), provide assistance for the new employer (professional training for the new employee paid for by Zanussi for one month), and provide assistance to set up in private business (support in drawing up a business plan, identifying specialized services, special training at Zanussi's expense, financial support in starting up the activity depending on the complexity and quality of the project).

In Italian terms, this certainly was (and still is) an original initiative and in certain respects a precursor of a new method for managing the structural surpluses of the workforce geared more to professional re-employment rather than short-term employment protection, thereby demonstrating that external flexibility can be managed on the basis of a variety of contractual relationships.

## **1.6 31. Trento Province Employment Agency (Italy)**

In the mid-1980s the province of Trento set up an Employment Agency with an independent management, administration and accounts department to implement local employment policies. Since its creation, the Agency has been concerned with finding employment for older people. The aim of one project was to employ men aged over 50 in environmental restoration works and women aged over 45 as administrative and custodial staff looking after the province's artistic and cultural heritage. The aim was to give older employees made prematurely redundant the opportunity to obtain the minimum old age pension provided for under national legislation. In general, the project was successful both in terms of the number of older workers involved and the benefits for residents and tourists.

The province of Trento is situated in north-east Italy and comprises, together with the province of Bolzano, the region of Trentino Alto Adige. Its population is about 457,000 and its economy is based mainly in the tertiary sector. The public sector is large, employing some 42,000 out of a total of 184,000 and its employment situation is much better than many other areas in the country (in 1994 the unemployment rate was at about 6 per cent). Like Valle d'Aosta and Friuli Venezia Giulia, Trentino also enjoys special autonomy. It has an administrative body with far-reaching autonomous legislative powers in numerous social and economic sectors at local level.

In the mid-1980s it set up an Employment Agency with an independent management, administration and accounts department to implement local employment policies. Since its creation, the Agency has been concerned with finding employment for older people, resulting in 1986 in 'The special project for employment generated by tourism and the region's ecological and environmental potential'. In 1990, this project was transformed and extended by the creation of a permanent body entitled 'The Service for Environmental Restoration and Improvement'.

The aim of the project was to employ men aged over 50 in environmental restoration works and women aged over 45 as administrative and custodial staff looking after the province's artistic and cultural heritage (exhibitions, museums, libraries, historic buildings, etc). More specifically, the aim was to give older employees made prematurely redundant the opportunity to obtain the minimum old age pension provided for under national legislation. The project, which was entirely financed by the provincial authority, was managed by cooperatives directly responsible for taking on the staff concerned (the employment contracts were therefore negotiated on a private basis). The number of people employed annually in the project since its inception to the end of 1994 averaged almost 750, 55 per cent of whom were men over the age of 50 and women aged over 45. The total number gaining entitlement to a pension came to 262. In general, the project was successful both as regards the number of older workers involved and the benefits for residents and tourists resulting from environmental improvements and increased access to the province's cultural heritage. A few limitations, however, should be noted, namely:

- a. the time constraint imposed on the employment contract which automatically expires without any possibility of extension when the person attains the minimum requirements laid down by national legislation governing old age pensions;
- b. the growing difficulty of employing older workers having problems finding jobs insofar as the undoubted advantages offered by the project (especially in terms of the security and quality of the work offered) end up by gradually preventing those involved from taking active steps to look for other employment opportunities (particularly in the case of women);
- c. the lack of flexibility, particularly as regards working hours and practices.

## 2.1 32. A Partnership Of and For Women: re-entry of women over 45 (Netherlands)

The basic principle of this initiative, which is in the process of development, is that a group of women aged 45 and over are helped to set up a partnership in order to serve a particular market as a network of 'freelancers'. The partnership will consist of divisions serving different branches/market segments. Initially the partnership requires supervision and subsidy (project management and training expenses). The organisation is intended and designed to become quickly self-supporting.

A project was commissioned by the Older People's Contact Group, part of the Social Renewal of Rotterdam project, to investigate ways in which re-entry by women over the age of 45 could be emulated. Women in this target group have number of actual or supposed disadvantages (such as an increased risk of absenteeism and lower physical capacity) and for certain kinds of work obvious advantages (deployable part-time, preferable between 12 noon and 8 p.m; flexible about working hours; generally fewer family obligations; highly developed work ethic; experience of life). Since opportunities on the ordinary labour market are virtually nil, a formula has been sought under which the actual or supposed disadvantages attaching to the target group in the eyes of potential employers/customers can be played down and the advantages can be exploited to the full. Starting from that premise a new concept has been devised.

The basic principle is that a group of women from the target group set up a partnership between themselves in order to serve a particular market as a network of 'freelancers'. This concept offers companies great advantages in economic terms (no salaried employees; spreading of risk; pay for work performed) and at the level of the flexibility of the organisation and the involvement with work (motivation). The partnership will consist of divisions serving different branches/market segments. Initially the partnership requires supervision and subsidy (project management and training expenses). The organisation is intended and designed to become self-supporting in a short space of time.

Reactions to this concept both from potential customers and from representatives of the target group have been quite enthusiastic. There are a number of concrete opportunities in the Rotterdam region, particularly in private home care and child minding.

The project aims to train 80 women to Home Help A level and to provide a refresher course for 20 women for a diploma as a Nursery Care supervisor. It is also intended to offer the women initial supervision and support in developing the partnership and in acquisition.

The project has been developed by KVM Consultants in Rotterdam and is still in a preparatory phase. The intention is that the project should be taken over immediately after the preparatory phase by a women's organisation in Rotterdam. The Municipality of Rotterdam will be asked for a pump-priming subsidy, to cover start-up costs of a 'home care division' in combination with an



application for ESF subsidy. A subsidy application for the Nursery Care division is pending with the district councils in Rotterdam.

Once these first two divisions have been set up further expansion is possible with the addition of new divisions. Possibilities include the catering sector (running canteens at the partnership's own expense), the cleaning sector, and stalls in old people's homes.

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### 33. Over 50s Employment Bureau (UK)

1.6, 2.1,  
2.4

This organisation keeps a register of unemployed older workers who are matched to job vacancies. An initial interview with unemployed clients aims to assess their motivation and job interests after which clients are placed on the register. The organisation mainly deals with small employers who are provided with a shortlist of suitable clients from the register.

This organisation consists of a project manager and a team of volunteer helpers. The project manager works on a part-time basis (three days per week).

This organisation is part of the local Citizens' Advice Bureau. It has been in existence for 20 years. Until three or four years ago it catered for people aged over 60 but, because it was increasingly being approached by many people aged between 50 and 60 who were worse off in terms of the benefits they were entitled to than those who were older, the organisation decided to target the over 50s as well.

The Bureau keeps a register of unemployed clients. Four-hundred and fifty clients are registered at present. The bureau deals with a range of clients from the unskilled through to managerial and professional people.

An initial registration interview is normally conducted in order to provide advice and counselling and to ascertain what underlying problems exist for the client. The registration interview addresses the following issues: the client's motivation; type of job the client is seeking; client's reasons for seeking a job; reasons for leaving last job and possibility of taking a case of unfair dismissal to an industrial tribunal; and tax and benefits issues.

The bureau has good relationships with many local companies. It tends to deal with smaller employers who frequently come back to the service for assistance in finding new employees. Jobs are matched to unemployed clients on the register and a shortlist will be presented to an employer. These services are free to both unemployed clients and client companies. The Bureau receives some financial donations from employers. The executive and professional support group is also trying to obtain funding.

In the past the Bureau tended to target unemployed people with few skills in the belief that it was that group that required the most help. However, recently, it has set up a mutual support group for managers and professionals. Members of the group also help in the running of the bureau. This

group provides comradeship, and helps to maintain members' skill and confidence levels after repeated rejection by employers.

With the assistance of the support group the Bureau is currently planning a major publicity drive with employers. There will be an emphasis on managerial and professional staff.

Volunteer workers with the Bureau receive a one-day induction course followed by on-the-job training. Volunteers often have personal experience of the problems facing older people in the labour market.

## 1.5 TRAINING PROGRAMMES TO SUPPORT RECRUITMENT POLICIES

### 1.2, 2.4, 4.3, 5.1 34. Hospital Group (France)

This is a public body. There are no age barriers to recruitment and training programmes actually encourage older people to return to the labour market at a time when there is a shortage of labour. Working conditions are studied with the object of easing age related working difficulties. Major efforts are devoted to ergonomics and to the mechanization of heavy tasks, and a study has recently commenced to consider the introduction of a monitoring system for detecting problems.

The Hospital Group is a public body located in the Ile de France which employed 68,964 staff in 1993. Highly susceptible to the characteristic economic fluctuations of the medical sector, recruitment is continuing, although at a lower level than previously (4,390 recruitments in 1993 compared to 5,168 in 1991). During the same period, the age structure of the workforce shows a slight rise due to the fall in staff turnover, historically high in this employment sector, and to an increase in the length of service of hospital nurses (nursing staff retire at 55 years of age). Average staff age rose from 35 to 37 years between 1991 and 1993.

The age structure is relatively balanced at present: more than half of all employees are between 26 and 40 years of age. Yet departures have fallen sharply in recent years (from 5,000 in 1991 to 3,500 in 1993), largely due to a net fall in 'voluntary' departures (availability, resignations), of which there were 3,000 in 1991 and only 1,842 in 1993. Furthermore, progressive reduction of working hours is hardly ever used. The trend towards a stable workforce could lead in future to an acceleration of workforce ageing.

Despite these uncertainties, age is not perceived as a problem in its own right by the Hospital Group. There are no barriers to recruitment, and training programmes actually encourage older people to return to the labour market, at a time when there is a shortage of labour. However, the current tightening of hospital budgets and surplus of labour could lead to age eventually becoming a criterion of selection.



Ageing is not at present regarded as a handicap. Its impact on working conditions is studied with the object of easing them. Ageing is treated as one of a broader set of problems which include the vocational hazards, strain, and exhaustion peculiar to the body of staff employed. Major efforts are devoted to ergonomics and to the mechanization of heavy tasks, and a study has recently commenced in conjunction with the National Agency for the Improvement of Working Conditions to consider the introduction of a monitoring system for detecting problems. Whilst they embrace the needs of older employees, such measures are not aimed exclusively at them, but merely reflect the Group's socially conscious tradition.

The Hospital Group devotes 5.99 per cent of its staff overhead to training, which includes courses on preparing for retirement, and rehabilitation courses for those who have been unemployed for extended periods but wish to resume work. This personnel policy and this relatively recent concern with the age pyramid are partly the result of the industrial unrest in 1988-89, when all branches of the health profession expressed their discontent. Measures adopted since then may not be directed specifically at older employees, yet they do not overlook them.

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### **35. Beschäftigungs- und Qualifizierungsgesellschaft mbH - Promoting reintegration through targeted training of the older unemployed (Germany)**

**1.4, 1.6**

The aim of a project recently set up by this organisation is to provide opportunities for training, education and communication to non-employed older men in the 45-60 age group. To ensure that training is tailored to the needs of individual participants a modular system has been developed. This provides greater flexibility as participants are able to select those elements which specifically meet their requirements. Group work and counselling sessions are intended to promote social and communication skills. The training takes place on two days per week for six hours each day. In addition, a series of events have been organised which have been designed to develop contacts between the participants, employers and job centres.

The Beschäftigungs- und Qualifizierungsgesellschaft mbH (Bequa) is based in Neuruppin (in the Land of Brandenburg) and was founded in 1991. It was originally the agency which ran the job-creation schemes developed for former workers of a large electrical engineering company in former East Germany. The project 'Akademie 2. Lebenshälfte' [Academy for the 2nd half of life] was launched in 1992 with financial resources from the European Social Fund and the Land of Brandenburg. Its aim was to direct workers towards new jobs. Bequa is one of the three agencies involved in this project and has various locations throughout the region.

The aim of the project was to provide opportunities for education and communication to older men in the 45-60 age group, who had been forced out of the labour market. Alternatively it would develop such facilities with them on a joint basis. This process of adaptation, which was designed to remedy educational deficits, was intended to open up new job opportunities for older workers within their previous line of work. At the same time it was designed to allow their skills and

experience built up over many years to flow back into the economy and encourage the creation of new jobs and activities commensurate with their age through joint project development.

By concentrating initiatives on the skills required by the economy - marketing, financial/cost accounting, introductory computer skills - the project has sought to provide training which will facilitate a return to employment. To ensure that training was tailored as far as possible to the needs of individual participants and their respective ages a modular system was developed. The existence of a range of differing modules provided greater flexibility as participants were able to select those elements which reflected their own background and requirements. The use of group work and counselling sessions to offer support and advice were intended to promote social and communication skills. In addition Bequa organized a series of events in each of its regions which were designed to develop contacts between the participants and employment exchanges and representatives from local authorities, unemployment centres and chambers of industry and commerce. The training was on two days per week for six hours each day. This ensured that participants were fully available for work as far as employment exchanges were concerned.

So far a total of 869 people have taken part in training events at the three locations. The majority of participants were aged between 40 and 50 (47 per cent), 27 per cent were between 51 and 55 and 26 per cent were over 55. The largest group were skilled workers followed by university and college graduates. There have been very few semi-skilled and unskilled workers. In total 315 participants have been directed towards new employment opportunities: 85 have found work through the primary employment market - primarily through their own efforts, 180 are participating in publicly funded job-creation schemes, 3 have become self-employed and 47 are currently attending longer training courses or retraining schemes promoted by the employment exchange.

### **36. EN-Pro Recyclingberatung - Certificated training for long-term unemployed, primarily foreign and older workers (Germany)**

This organisation runs a public transport system. The company has decided to reduce job stress through job restructuring and making changes to career patterns. One possible development is to allow employees time during working hours to acquire a secondary skill. They would then be qualified for other jobs in the company. The introduction of duty roster groups was seen as a further possibility. Employees would be allocated to a group and each group would then plan and supervise the deployment of drivers on a certain part of the transport network. Participation in these duty roster groups would offer group members a wider range of individual jobs, with different physical and cognitive stresses. In future, attempts will be made to start additional training programme earlier in the career cycle and for job change to be a more planned occurrence.

En-Pro-Recycling-Beratung, who are located in Pulheim, is part of the service sector. It provides advice to manufacturers on the recycling and disposal of by-products and residues. The company itself has a workforce of about 20 staff.

In conjunction with TöV [Technischer überwachungsverein - Technical Inspectorate] Rhineland and in close cooperation with medium-sized companies it has developed a one-year course on specialist dismantling methods for the recycling industry. The scheme was not targeted specifically at the older unemployed. It was directed primarily at long-term unemployed with only a school-leaving certificate and without any vocational training. However in contrast to other similar measures for long-term unemployed the percentage of older participants was above average: 50 per cent were aged over 40 and the oldest was 52. It was also distinguished by the fact that the participants were primarily ethnic Germans who had emigrated from Russia.

So far two courses have been run each with 15 participants. To reflect the needs of the target group it alternates between theory and practical sessions. In addition it provides for work experience with actual disposal companies. The course content includes information on types of substances and materials, safety regulations and dismantling techniques.

Older participants were not only in the majority but their behaviour during the course itself showed greater stability and a high level of motivation. Almost all those who completed the course have been awarded the official certificate and have now found work, primarily in the medium-sized disposal companies where they completed their work experience. About 75 per cent of those who participated are now in employment.

### **37. Professional Training Centre of the Bavarian Employers' Federations - Training for older workers (aged 45-55) threatened with unemployment (Germany)**

This organisation has developed a range of pilot training initiatives for older workers from industrial companies. They are targeted at older workers who have been forced or wish to leave their industrial jobs, and are designed to create employment opportunities in smaller and medium-sized companies. The primary target is the 45-55 age group. In cooperation with the relevant employment exchanges the initiative will provide refresher training to semi-skilled, unskilled and skilled workers. The measures consist of courses to update existing vocational skills supplemented by training in the skills required for the use of new technology. To avoid or minimise periods of unemployment, training is combined with work experience and job placement services.

The Professional Training Centre of the Bavarian Employers' Federations (BFZ), which is based in Nuremberg, has developed a range of training initiatives for older workers from industrial companies in the Schweinfurt area. The background to these initiatives, which are currently in the pilot stage, was the economic crisis in this region (cf. in subsequent sections IAB 1994). The economy of this area has been dominated by one industry and consists primarily of companies supplying the vehicle and mechanical engineering industry. Many of the workers come from the surrounding rural area - including areas in the former East Germany - and commute to work in Schweinfurt. Production levels have fallen considerably during the recent economic recession and this has placed many jobs in jeopardy.

The training initiative - promoted by the German Federal Institute for Vocational Training and the European Social Fund - is targeted at older workers, who have been forced or wish to leave their industrial jobs and is designed to create employment opportunities in smaller and medium-sized companies. It is assumed that the division of labour is not as widespread or clear-cut in such companies and that extra- functional skills play a more important role. This means that they offer good employment prospects for older workers. The primary target is the 45-55 age group, as it is felt that these workers have a better chance of finding employment compared with the over 55 group. In addition this age group is covered by very few transitional arrangements to cover the period up to retirement.

In cooperation with the relevant employment exchanges the initiative will provide update training to semi-skilled, unskilled and skilled workers. The measures consist of refresher courses to update existing vocational skills supplemented by training in the skills required for the use of new technology. The aim is to expand vocational skills which have become restricted by long years of specialization in industrial jobs where division of labour is highly developed. To avoid or minimize periods of unemployment training will be combined with work experience and job placement services.

The training establishment has not provided information on participant numbers or results to date, pointing out that it intends to publish its own report in the near future. It is, therefore, impossible to make any final assessment. However the approach as such can be viewed as positive as it does attempt to look to the future and take action in the run-up to actual unemployment and it does have a realistic chance of improving the employment opportunities of older workers. If it proves successful it may serve as a model for a preventive element which can be incorporated in employment policies for older workers.

## **1.6 EMPLOYMENT EXCHANGE/JOB CENTRE FOR OLDER WORKERS**

### **1.4, 1.5 38. Gesellschaft für Arbeits- und Wirtschaftsförderung des Freistaates Thüringen - Targeted placement of older unemployed with the help of support workers (Germany)**

Under this initiative workers aged 54 and over leave the employment of the Treuhand agency (agency set up to administer state property in the former GDR). During the period until they are aged 60 they are paid a guaranteed income and undertake to be available for work. The GFAW has built up local networks designed to assist these workers and place them in employment. It has also established a network of special 'support workers' who look after and seek employment for the members of the group. As part of their job placement remit they contact companies in their area, acquaint them with the opportunities provided by the programme and put forward names of older workers who might be suitable for any vacancies. Work preparation training and work experience are also provided.

The Gesellschaft für Arbeits- und Wirtschaftsförderung mbH (GFAW) des Freistaates Thüringen was established in 1994. The main shareholder is the Land of Thuringia and its remit is to implement a special development programme in Thuringia entitled 'Older Workers'. This programme was developed by trade unions, the Länder authorities and the sponsoring agencies of the Länder for job creation and employment companies. Under the scheme termination agreements are concluded with workers aged 54 whereby they leave the employment of the Treuhand agency [agency set up to administer state property in the former GDR] and are monitored on the grounds of their unemployment until they reach the age of 60. During this period they are paid a guaranteed income and undertake to be available for any reasonable offers of work.

At present the GFAW is looking after 886 former employees of Treuhand organizations, 199 of whom are women. The majority of participants already have a vocational qualification (58 per cent), 23 per cent are university or college graduates and 19 per cent of the group are unskilled and semi-skilled. The vast majority are aged between 55 and 57, only 2.4 per cent of whom are 58 and older.

To ensure that care is provided as locally as possible the GFAW has built up local networks designed to look after the older workers and place them in employment. Under the terms of cooperation agreements concluded with regional employment offices GFAW has also established a network of special 'support workers' who look after and seek employment for the members of the group. These support workers are themselves members of the group and know many of the other participants and are familiar with their employment prospects and problems. As part of their job placement remit they contact companies in their area, acquaint them with the opportunities provided by the programme and put forward names of older workers who might be suitable for any vacancies.

These support and job placement activities are supplemented by training measures, which are designed to provide both a stimulus and targeted preparation for new jobs. So far training schemes have been developed for the service sector/commerce, timber processing, transport/storage, biotope mapping/ digitalization and archiving of economic data. Each training programme consists of a general followed by a specialist element. This latter element concentrates primarily on the knowledge and skills required in a business situation. In addition work experience is offered which has the added purpose of securing possible employers for participants after their training.

Since the programme started in 1995 work has been found for 163 participants, mainly in the newly established small and medium-sized manufacturing companies. The majority are on short-term contracts with an average length of 6 months. An additional 154 older workers have participated in the training schemes referred to above. In total new opportunities have been opened up for 317 or 38.5 per cent of the target group.

### 39. Uitzendbureau 55+: finding work for the unemployed over-55s (Netherlands)

The aim of this community based employment agency is to: match older people to job vacancies; to investigate the extent of actual demand on the part of older workers and employers; and to make a positive contribution to the debate on older people and work.

This example concerns a local 'community initiative'. On 1 January 1993, in order to promote the participation in the labour process of the over-55s, a special temporary work agency was set up on the initiative of the Foundation for Older People's Welfare in Weert. This two-year project, which ran until 1 January 1995, was accommodated at the premises of the Start temporary staff agency in Weert. This temporary employment agency was originally set up to organise temporary work on a non-profit basis for groups difficult to place in the labour market. The financial funds for the over-55s temporary staff agency were obtained from the Stichting Fonds Opleiding en Ontwikkeling (Training and Development Fund Foundation).

The main aim of the project is 'to bring older people into closer contact with work', as part of the emancipation, participation and integration of older people. In broader terms the objectives are:

- to match older people and job vacancies;
- to investigate through operating the project the extent of actual demand on both sides;
- to make a positive contribution to the debate on Older people and work: what they have to offer each other.

One might tend to expect an overlap between the operations of this agency and those of ordinary job centres. However, since under current legislation the 55-plus age group falls outside the scope of the job centres, there is no question of an overlap but rather of a hiatus.

An evaluation of the results after the first six months produced the following picture. 120 older people registered. Ten of these dropped out for various reasons, leaving 110 people aged 55 and over for whom work could actually be sought. Of this group thirteen people were found temporary work, five of whom finished working (during the period under review). The remainder are still employed at the end of the first six months. 24 vacancies were disregarded, and six could not be filled. By the end of the two-year period the number of registrations had risen to over 400. Of these approximately 80 people were placed in employment, fifteen of whom were still working at that time. The kinds of jobs people find themselves doing vary very widely, and include cement painting, assisting in a dispatch company, courier work, selling hydraulic equipment, maintenance fitter, pay clerk, attendant in a showroom, assistant in a furniture company, logistics manager and compiler of the evaluation report mentioned below.

The evaluation report on this initiative concludes that (a) 'the demand for work among those aged 55 and over has been demonstrated' and (b) 'employers' need to take advantage of the enthusiasm of the over-55s was clearly illustrated by the frequently heard remark that 'someone over 55 will

be fine'. In the evaluation report it was also stressed that most early retirement schemes act as a hindrance to this scheme, since the early retirement benefits cease if one does paid work. For that reason the report calls for these schemes to be made more flexible. Another conclusion is that older people's expectations are often too high. They are looking for work where they use all their expertise and experience, giving them maximum freedom and a more than adequate wage. According to the compilers such opportunities scarcely exist. For that reason they agree that older people should be more flexible in that respect and be prepared to take on other work.

### **40. Uitzendbureau J&M (Jong en Middelbaar, Young and Middle-Aged): placement of staff aged 50 and over (Netherlands)**

Uitzendbureau J&M (Jong en Middelbaar, Young and Middle-Aged) This temporary staff agency specialises in providing temporary staff in the office administration and service sector. Although young job seekers can also use the agency the emphasis is on finding work for people aged 50 and over. The organisation has particular expertise in placing retired people.

The J&M temporary staff agency was founded in Rotterdam in 1990 and specialises in providing temporary staff in the office administration and service sector. Although young job seekers can also use J&M the emphasis is on finding work for the 'middle-aged', the over-50s. In so doing the agency is responding to the predicted rise in the average age around the turn of the century. Moreover, the founder of the company - Mr De Groot - has years of experience in the temporary staffing sector and particularly in placing retired people. According to him many of these people want to continue to spend part of their time working. However, Mr De Groot knows from experience that older people are often more than welcome in companies and organisations once the threshold has been removed. The older person's specialist knowledge is often decisive in causing the employer to approach J&M rather than another agency - like an accountancy firm looking for a temporary all-round reliable bookkeeper, or the organiser of an event looking for stewards with a customer-friendly manner. Because many temporary staff agencies and the job centres (can) do little or nothing for this group J&M has taken advantage of this gap in the market.

The jobs on offer through J&M vary from simple operational work such as warehouse assistant and simple clerical posts to interim managers. At present some 400 job-seekers are registered with J&M, 40 of whom have been found temporary work. Their ages range from 52 to 77. An example of a placement is a retired tailor aged 69, who through J&M has found a temporary job as a receptionist:

I receive visitors and direct them to the right floor. I also deal with the incoming post and distribute it within the building. Apart from that I keep an eye on the parking situation via the monitors. I'm getting on very well in this part-time job, and it leaves me sufficient time for my hobby: singing in a choir.

In practice the facts show that often half of those found work are eventually taken on full time.

From the look of it J&M is meeting a need. Older job seekers are given the opportunity of again putting their knowledge and experience at the service of industry in a meaningful way. In view of the positive results, and the applications from both employees and employers, J&M is considering launching an Uitzendbureau 65+ in the same location.

#### **41. Skillco: new opportunities for retired and highly qualified staff aged 50 and above (IBM) (Netherlands)**

This consultancy organisation was set up by ex-employees of IBM utilising people who had taken early retirement from IBM. Skillco uses a temporary staff formula: it sends people on secondment and looks for contractual partners. People who register with Skillco are predominantly ex-IBM staff with a high level of education. Skillco and IBM have signed a long-term agreement for the provision of temporary and part-time support to IBM. Skillco does not cater exclusively for ex-IBM employees. Anyone who has left or is about to leave the labour market under an early retirement scheme can register.

Like many companies in the Netherlands, IBM has excellent early-retirement schemes. Consequently many people have taken advantage of them in recent years. This did, however, result in the premature departure of quality staff. People who had for years occupied management posts at IBM were now unemployed. Two ex-employees of IBM realised that a large amount of expertise and quality was leaving the labour market prematurely. In addition they believed that industry in the Netherlands needs experienced, expert people in a large number of fields. In order to regroup this exodus of expert and quality staff and offer it to Dutch industry, they set up Skillco Human Resource Management BV with the help of IBM. In fact, this is not something unique to the Netherlands, and we find similar initiatives in IBM branches in other countries.

Skillco uses a temporary staff formula: it sends people on secondment and looks for contractual partners. People who register with Skillco are predominantly ex-IBM staff with a high level of education. In February 1991 an official joint venture between IBM and Skillco was launched. As one of the 'parents' of Skillco, IBM Nederland NV has a seat on the Supervisory Board. Skillco and IBM have also signed a long-term agreement on the provision of temporary and part-time support to IBM. However, Skillco does not cater exclusively for ex-IBM employees. Anyone who has left or is about to leave the labour market under an early retirement scheme can register.

Here too experience shows that people who have taken voluntary early retirement feel a need for temporary, part-time work.

According to the founders of Skillco:

There are very few people who really don't want to do anything at all. We have all learned to work within our networks of relationships. When you are at home by yourself those are the contacts you begin to miss first. You'd like to continue them. But you don't want the pressured, hectic atmosphere of having to do things the whole time any more. On the right

terms you are certainly prepared to give your best to projects. Why not? After all, you were good at your job. Why shouldn't you look for new challenges? Skillco offers those opportunities.

Besides Skillco's business object the organisation also has a social function. That can be seen from the aim of the 'Grey Blue Circle'. The basic activity of the Grey Blue Circle is the annual publication of list of addresses and areas of interest of (early) retired participants, which is for circulation only among the same retired group. The publication is intended solely for the use of participants and must not be made available to third parties. Staff retiring from IBM are deprived from one day to the next of facilities like IBM's internal telephone directory, which enables them to arrange to meet colleagues, solve problems, or undertake joint action. But there is also the question of how one contacts one's ex-colleagues? The Grey Blue Circle fills this gap.

In 1991 over 150 contracts were concluded through Skillco. For 1992/93 it had over two million guilders' worth of contracts on its books and for 1994 this was over four million guilders. This is mainly the result of contracts with large companies (including the PTT). The pool of registered participants averages 1000, of whom a minimum of 20 per cent are deployed in projects annually for a longer or shorter period.

Meanwhile Skillco has grown into an organisation catering not only for older people but also for the young. Work is sought abroad as well as in the Netherlands. Opportunities are even being explored in the Middle East. Many of those registered with Skillco were used to working abroad temporarily in their IBM days, and have no qualms about putting their knowledge and experience to temporary use abroad again.

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### **42. GALAXEN - a rehabilitation and re-employment agency for older building workers (Sweden)**

This organisation, which consists of a national centre and regional branches, provides rehabilitation and subsidised employment to building workers. It has a good success rate in maintaining employment among this group and, thereby, reducing early exit.

In 1986 the trade unions and the employers in Building and Construction together with the Labour Market Board and Social Security offices set GALAXEN, which is a typical Swedish tri-partite (unions, employer, state) corporatist organisation handling rehabilitation and subsidized re-employment for building workers. There is a national organisation as well as 24 regional organisations. This was an organisation whose aim was to support rehabilitation of building and construction workers and to bring some of them back to normal work.

Today, only about 10 per cent of building and construction workers are still employed and working when they reach 65 years.

The basis of this programme are Local Adaptation Groups (LAGs), consisting of representatives from employers, unions, labour market offices, social security offices, rehabilitation agents, occupational health specialists and so on. Workers who need rehabilitation are channelled through these LAGs. A plan is made up for each individual. The measures used are:-

- education and training (labour market training)
- work rehabilitation, training etc (rehabilitation agents, rehab centres)
- sheltered employment (SAMHALL)
- and being allocated to GALAXEN

About one fourth of those who are handled in the LAGs are then handled by GALAXEN. This means that they are being hired by an employer in building or construction, have a specific job that is suited to their capacity and that the employer organises a rehabilitation plan that is adapted to this individual. If firms accept this procedure, they get a 50 per cent wage subsidy.

From the beginning the goal for GALAXEN was rather modest. It was set to a return rate of 10 per cent, i.e. persons who could go back to a normal non-subsidized job in the building sector again. Until now the success rate has been 25 per cent, according to data supplied by GALAXEN. This should also be seen in the proportion of those in LAGs that are referred to GALAXEN, which is 25 per cent in all.

In 1996 about 1,200 persons were handled by GALAXEN, Of these the majority, i.e. 700 were above 46 years. More specifically there were:-

200 between 46-50

240 between 51-55

250 between 56-60

and 75 between 61-65

In ten years the number of complete successes, i.e. workers that have been re-employed on normal (non-subsidized terms) amounts to about 500 persons.

GALAXEN is seen as a rather successful rehabilitation measure by the different actors and organisations that are involved. It has a reasonable rate of success in keeping some of the older workers in the building and construction sector in the labour market, either in sheltered employment, subsidized or, for a minority, re-employment in a 'normal' job. This is a policy that is not directed specifically towards older workers, but that nonetheless covers many older workers in an exit-prone sector.



### 43. Third Age Challenge Trust (UK)

1.2, 1.3,  
1.4, 2.1,  
2.3, 2.4,  
2.6, 6.2

TACT is a charitable organisation which aims to help set up, support and promote local projects providing counselling and guidance to older workers and offer services to employers. TACT's expertise includes: planning and budgeting, running a campaign, training materials, management skills, and trainer training. To date TACT has established a network of 39 organisations.

Third Age Challenge Trust (TACT) is a charitable organisation based in Swindon. It formally came into existence in April 1995. The aim of TACT is to promote and support a network of local projects which will:

- \* create opportunities for training and guidance;
- \* tackle age discrimination; and
- \* help secure employment for people in their third age.

Specifically TACT is working with local projects which:

- \* providing counselling and guidance to older workers on training and employment opportunities;
- \* work with employers and local agencies to improve the prospects for older workers and promote projects which utilise the skills available to meet commercial need in the local economy.

TACT assists local projects in a variety of ways. These include the following:

- \* developing a project plan and budget; understanding the labour market and the relevant public and private organisations; how to implement the project plan;
- \* how to run a campaign for local funding from business and government;
- \* providing training materials for groups and individuals;
- \* developing project management skills including accounting skills;
- \* sharing experience via conferences of local projects, newsletters and trainer training;
- \* assistance with promotion activities;
- \* using examples of good practice to raise standards generally.

To date TACT has a network of 39 organisations which are committed to adhering to a code of practice in working with older workers. The contents of this code of practice is presented in full on the following page.

Examples of two projects which have received assistance from TACT are the Mature Workers Register (Bournemouth) and New Directions Fifty-Plus (Harlsden) details of which are contained

in this portfolio. Another example is TACT Guilford, a self-help group of managerial and professional people which has had 120 members over the last two years. Through this organisation 60 clients have obtained job interviews and 30 have found employment. A further example is TACT York, a self-help group which uses the skills of the membership to run a fully functioning job-search, support and recruitment membership association. The approach is based on the American model of '40 + associations'. The association has a structured management system which incorporates specialist departments which are staffed by the membership with managers democratically elected. The 'product' of the association is its membership and its equivalent of 'sales' are those members who find employment.

TACT has the following aims for the next three years:

- \* build up a network of 40 local projects;
- \* develop a programme of working providing assistance to 5,000 individuals a year;
- \* to assist three out of four clients into new roles. This will include a total of 25 per cent of all clients into full-time employment and 50 per cent of all clients into training, part-time employment or self-employment.

### **The Third Age Code of Practice (UK)**

#### *During Employment*

1. Recruit, train, select, promote and reward employees on their ability to meet the needs of the business, irrespective of age.
2. Actively encourage employees of all ages to take responsibility for their self-development, especially in acquiring new skills as technology and working practices change. Also provide the necessary facilities.
3. Provide reasonable opportunities for flexible working for those caring for elderly relatives.
4. Promote anti-ageism policies generally.

#### *Before Retirement*

5. Provide courses in preparation for retirement.
6. In the event of redundancies becoming necessary, select those to be made redundant on the basis of needs of the business rather than on the age of individuals concerned.

#### *After Retirement*

7. Ensure where appropriate, that all employees have access to a company pension scheme or satisfactory alternative, which provide adequate cover on retirement.
8. Promote networks, including pensioners' associations, so that individuals have access to a mechanism through which they can offer support to one another.



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#### 44. New Directions Fifty-Plus Harlsden (UK)

2.1, 2.4

This organisation aims to help older people into training and employment. The project offers one-to-one assessment and guidance, motivation training and training in office skills, computing and writing CVs. The main source of referrals to the project is the local Job Centre. After initial training clients are invited to return to the project to check notice boards where job vacancies are displayed. The project manager also visits local employers to discuss with them the benefits of employing older workers.

This organisation is accredited by Third Age Challenge Trust (TACT). It is funded by Harlsden City Challenge and TACT and is in its first year of operation. It commenced operations in November 1995 and has received funding of £30,000 for one year. The aim of the project is to help older people in Harlsden into training and employment.

The project is led by a project manager who has the help of a volunteer. The project manager carries out one-to-one counselling with clients and leads group sessions with clients. He also visits local employers to discuss with them the potential benefits of employing older unemployed people.

The volunteer worker was employed previously as a job club leader before being made redundant. He answers the telephone, helps clients with their CVs and basic computer skills and matches clients to job vacancies which the project is notified of by employers and local job centres.

The project offers one-to-one assessment and guidance, motivation training, and training in office skills and basic computing. It has targets for the year of getting 25 people into paid employment, 127 into training and holding 175 guidance interviews.

There are several sources of referrals to the project. The main source is the local job centre. Other sources include the Church, the local housing association and employers making employees redundant.

The first stage of the process for each client is a three hour introductory seminar. There is a target of ten clients per seminar. The aims of the project are explained to the group. They are told there is no direct link between the project and official government agencies and that attendance will not affect their entitlement to benefits. Clients are then given an application form to complete.

Following this each person attends individual and group sessions over a two week period. First, each client receives a one-to-one counselling session with the project manager. The purpose of this session is to examine each client's needs in depth: his or her motivation, numeracy, literacy and skills. If skills training is required that cannot be supplied by the project, clients will be referred on to another training provider.

The next stage is known as lifelong training. This group session asks individuals to analyse why they are not finding jobs, evaluate their skills and identify what they enjoy doing most and what they enjoy doing least. Clients also practice interview skills with each other. This session lasts three hours.

A further six hours training is available to each client. This may include practising basic computer skills, office skills and updating CVs.

After this initial training clients are invited to return to the project on a regular basis to check notice boards where job vacancies obtained from local job centres and employers are displayed. At the time of our interview there were 118 clients registered with the project. To date ten people have found full-time and one person part-time employment after receiving help from the project. In addition, 41 clients have received basic training such as computer skills through the project or have been referred on to a training provider for more extensive training.

Although only set up as a service to work with people in the Harlsden area, in fact, the project is frequently contacted by people from outside the area wanting help.

#### 2.1, 2.4 45. Mature Workers Register (UK)

The aim of this project is to hone job-search skills so that unemployed older people can sell their abilities and skills and compete in the job market. The project offers one-to-one careers guidance, training in job-search techniques, CV writing and interview techniques. Clients can use a photocopier and a telephone and are provided with free stationery and postage. The project also offers a drop-in service for four days per week when clients can check job vacancy notice boards.

This organisation is also accredited by Third Age Challenge Trust. It is funded by Bournemouth Employment Service, Dorset Training and Enterprise Council and the European Social Fund. The project was set up in 1994 by an unemployed airline sales and marketing executive in his fifties who became the project's director. Until recently he received assistance from an unemployed person recruited from the government's Community Action programme. However, this person has now left to undertake a training course.

This Employment Service funding allows the project to run two job clubs per week where between six and ten unemployed clients aged over 50 receive assistance in job-seeking techniques, CV writing, interview techniques and have access to up-to-date vacancies supplied by all the local job centres, the TEC and voluntary sector. Originally the Employment Service's funding was to run a pilot project for one year. After one year the contract to run the service was put out to competitive tender and the contract was re-awarded to the Mature Workers Register.

64 The present Employment Service contract expires at the end of 1996.



The TEC's funding supports a 'Gateway' programme of one-to-one careers guidance and advice to unemployed older people, the marketing of older workers to employers and public relations work. The project also offers a drop-in service for four days per week when clients can check job vacancy notice boards. They also have use of a photocopier and telephone as well as being provided with free stationery and postage.

The overall aim of the project is to hone job-search skills so that clients can sell their abilities and skills and compete in today's job market. The project also aims to reduce the sense of isolation felt by many clients and to restore self-esteem and motivation. Another aim is to get across to clients that, while they are unlikely to find jobs which pay as much as their previous jobs, there are jobs available that can still provide a living wage and a sense of fulfilment.

The project has assisted individuals from a variety of professions including: carpenters, police officers, solicitors, ex-service personnel and engineers. Of these, the vast majority (90 per cent) have been men. The average length of unemployment of clients coming to the project has been two years.

To date, of the 400 clients who have received assistance from the project, 110 have found employment. In the majority of cases clients have moved from larger to smaller employers and have tended to find jobs which paid less than they were earning before. In addition, only 11 people, of whom six were women, have stayed in the same line of work as they were in previously.

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## **OTHER RECRUITMENT INITIATIVES**

**1.7**

### **46. Valle d'Aosta Region Employment Agency (Italy)**

**1.3**

The local administration's interest in older workers dates back to the early 1990s when certain regional laws were passed providing incentives for the employment of people over the age of 30. However, the attention given by the region to the problem of long-term unemployment amongst older people is particularly evident in a recently introduced employment policy plan introduced in response to the growing scarcity of local labour. These measures make provision for: i) financial incentives for the employment of older long-term unemployed people; ii) support for community projects or cooperatives that employ disadvantaged persons or long-term unemployed people aged over 32.

Valle d'Aosta is a small region in north-west Italy on the border with France with a population of about 120,000. Its economy is basically tertiary: of the 52,000 people in employment, 35,000 work in the service sector, particularly in the public sector and the tourist-hotel industry. From an administrative point of view, Valle d'Aosta enjoys autonomy being one of five national regions with a 'special statute'.

The employment situation is certainly better than the national average (in 1994 the overall unemployment rate was 5.6 per cent compared to almost 12 per cent nationally). This is due to the

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activities of the Employment Agency in the region which has wide-ranging responsibilities in this field (ranging from incentives for matching labour supply and demand, to promoting measures aimed at increasing employment, particularly among the most vulnerable sections of the population).

The local administration's interest in older workers dates back to the early 1990s when certain regional laws were passed providing incentives for the employment of people over the age of 30. However, the attention given by the region to the problem of long-term unemployment amongst older people is particularly evident in the recent three-year employment policy plan (RL 3/95) adopted last February. This was a direct response to the growing scarcity of local labour, estimated at some 500/700 workers per year.

These measures make provision for:

- a. financial incentives particularly for the employment of people unemployed for more than 12 months and aged over 50 in the case of men and 45 in the case of women (28 million Lire over two years for men and 40 million Lire over two years for women);
- b. support for public works projects (urban and rural improvement works, cultural and artistic improvement works) promoted by public authorities (mountain communities, communes and groups of communes and public services) or cooperatives that employ disadvantaged persons (the disabled, ex-prisoners, etc) or people unemployed for more than 12 months aged over 32.

Compared to previous regional legislation, the novel aspects of Law 3/95 are the greater consistency of the employment incentives and the increased age limit of the beneficiaries (50+ for males and 45+ for females). Since it has only recently entered into force, it is too early for its effects to be assessed. However, according to officials in the local Employment Agency, it has all the signs of being successful when compared to the results obtained by previous legislation. Nevertheless, there is one implicit danger in this initiative: the fact that it simply compensates for incentives granted for the employment of young people at national level with the result that companies may not consider it sufficiently profitable to employ them.

#### **1.4 47. Friuli Venezia Giulia Region Employment Agency (Italy)**

In the mid-1980s an employment agency was set up in this region as a public body with responsibility for implementing regional employment policies. As part of a recent employment programme the Agency made provision for financial incentives to organisations for: i) the employment in cooperatives of people who, having no salary and no entitlement to IEF payments or mobility allowances, who are obliged under national regulations to work for a maximum of five years to acquire the right to a minimum retirement or old age pension; ii) the employment in cooperatives of long-term unemployed people aged over 40 and who are not covered by any other national provisions.



The region of Friuli Venezia Giulia is situated in north-east Italy and has a population of 1.2 million. Its industry consists mainly of closely interrelated SMEs in the traditional manufacturing and tertiary sectors. The employment situation is somewhat better than the Italian average with an unemployment rate of about 6 per cent, and an activity rate of just under 45 per cent. As with Valle d'Aosta, Friuli Venezia Giulia also enjoys special autonomy.

Towards the mid-1980s, the regional Employment Agency was set up as a public body with responsibility for implementing regional employment policies on the basis of three-year intervention programmes. As part of the latest three-year employment programme 1995-1997, adopted in early 1995, the Agency made provision for incentives to companies, consortia, public authorities, and associations based in the region or with branches there for:

- (a) the employment in cooperatives of people who, having no salary and no entitlement to IEF payments or mobility allowances, are obliged under national regulations to work for a maximum of five years to acquire the right to a minimum retirement or old age pension;
- (b) the employment in cooperatives of people aged over 40 who have spent between 12 and 24 months on the unemployment register and who are not covered by any other national provisions.

The incentives provided for under (a) are as follows:

1. for unlimited employment contracts 800,000 Lire per month for 24 months (600,000 if part-time) and for fixed contracts 500,000 Lire per month for 24 months (300,000 if part-time);
2. for persons employed in cooperatives a one-off payment of 19.2 million Lire (14.4 million if part-time);
3. an increase of 30 per cent in the case of women.

The incentives provided for under (b) are as follows:

1. for unlimited employment contracts 900,000 Lire per month for 24 months (510,000 if part-time) and for fixed contracts 660,000 Lire per month for 24 months (360,000 if part-time);
2. for those employed in cooperatives a one-off payment of 21.6 million Lire (12.24 million if part-time);
3. an increase of 30 per cent in the case of women.

It is still far too early to assess the effectiveness of this measure. However, attention should be drawn to its innovative nature compared to the employment policies so far implemented by the Agency, particularly as regards the minimum age of beneficiaries (in the past the minimum age was 29 instead of 40).

## 1.4 48. Lombardy Region Employment Policy (Italy)

Recently this region has suffered a particularly difficult manufacturing and employment crisis. Those most affected by the recession were older employees made prematurely redundant and facing strong discrimination in seeking re-employment. This led the regional administration to include older workers explicitly among the designated disadvantaged groups. It provides: i) financial incentives to employers recruiting a person aged over 35 or who is long-term unemployed; ii) incentives in the form of loans for people aged over 35 to set up small businesses.

Situated in north-west Italy, Lombardy is the most populated region with almost 9 million inhabitants. It has always had a central position in the national economy. However, in the last two years, it has suffered a particularly difficult manufacturing and employment crisis. Between 1985 and 1991 unemployment fell. In 1992 it started rising again and accelerated sharply in 1993 (the overall rate of unemployment of 4.8 per cent in early 1993 increased to 6.8 per cent in January 1994). Those most affected by the recession were older employees made prematurely redundant and facing strong discrimination in seeking re-employment (the rate of those leaving the unemployment register was approximately 50 per cent for people aged under 30 and 10 per cent for those over 49). This led the regional administration to include older workers explicitly among those disadvantaged groups who receive the benefits provided for by Regional Law No. 9 of 27 April 1991, 'Measures to support employees with employment difficulties'.

In particular, the Law provides for:

- (a) under Art. 3, payments to public bodies and companies, as well as cooperatives, (equal to 5 million Lire per male employee and 7.5 million Lire per female employee) to employ on unlimited contracts people aged over 35 who have lost a previous job (in other words they are at the top of the relocation lists) or who are on IEF for more than 12 months (more than 24 months in the case of employees admitted on a rotation basis), or who are entitled to special unemployment benefit under Law No. 1115/1968 and subsequent amendments;
- (b) under Art. 7, incentives for setting up small enterprises (in the form of cooperatives, simple companies and collectives) formed by employees aged 35+ who fall into one of the three categories referred to under point (a) above; the incentives take the form of soft loans (estimated rate of 5 per cent) up to a maximum of 150 million Lire, one-off payments up to a maximum of 10 million Lire, and the provision of various specific services to assist the new enterprise.

Although it was passed in 1991, Law No. 9/91 actually entered into force in early 1993 and to date there have not been a large number of applications: under Art. 3 a total of 39 companies have applied, covering a total of just over 40 employees; under Art. 7, total applications amount to 18, of which 15 were accepted, covering a similar number of employees. The results achieved so far

under the law are not particularly significant. According to the officials responsible, the reasons for this low take-up of benefits can be attributed to:

- a. the deterioration of the economic climate which has made it less attractive for companies to take on new staff despite the incentives (which themselves are not particularly attractive);
- b. the need, on the part of older unemployed people aiming to set up a new company, for substantial initial capital investment (the law makes no provision for prefinancing).

### 49. Liguria Region Employment Promotion (Italy)

In recent years company restructuring has taken place on a wide scale in this region leading to the redundancy of large numbers of older employees with obsolete skills and low professional qualifications. As a result the Regional Council adopted a draft Law which makes provision for grants to companies which take on older employees and provides assistance for those aiming to start up business on their own. The law provides for: i) a one-off payment to employers for retraining or reskilling unemployed persons aged over 40 employed on unlimited contracts; ii) a one-off payment to organisations which employ as social workers unemployed people aged over 40. An earlier Regional Law encourages cooperation between younger and older people in starting up new companies with a view to promoting an intergenerational transfer of professional expertise.

Liguria lies in north-west Italy and has a population of just over 1.5 million whose average age, as in the whole of northern Italy, is relatively high. Like Piemonte and Lombardy, the region is characterized by the prevalence of medium-sized and large enterprises operating primarily in the developed industrial sector. For this reason, in recent years company restructuring has taken place on a wide scale leading to the redundancy of large numbers of older employees with obsolete skills and low professional qualifications: between 1993 and 1994, the number of persons who lost their jobs increased from 24,000 to 29,000 (the overall unemployment rate rising from 9.4 per cent to 10.4 per cent).

In view of the worsening employment situation of older employees, last March the Regional Council adopted draft Law No. 481 'Provisions to promote employment' (RL 30/95). This makes grants to companies that take on older employees and provides assistance for those aiming to start up business on their own. In particular, the law provides for:

1. a one-off payment to employers (up to a maximum of 20 million Lire per person) for retraining or reskilling unemployed persons aged over 40 (over 45 if on IEF as part of a collective agreement or on mobility allowance) employed on unlimited contracts;
2. a one-off payment (up to a maximum of 25 million Lire per person) to cooperatives, individual companies and workers' associations which employ as social workers (or, if newly established, in which at least 50 per cent of the staff are social workers) unemployed people aged over 40 (over 45 if on IEF as part of a collective agreement or on mobility allowance).

At the moment the law is not in force and is still being considered by the Government Commissioner. No assessment can therefore be made of its results. However, the local administration has made efforts to tackle the problem of discrimination against older workers with respect to employment opportunities. Indeed, an earlier Regional Law (RL 36/88) encourages cooperation between young and old people in starting up new companies (with a view to promoting an intergenerational transfer of professional expertise). Little use was made of the funds provided under the regulation because of the lack of finance, information and support networks. The most recent draft law aims to overcome these difficulties through the assistance provided by the local Employment Agency (a Ministry of Employment body which aims to match labour supply and demand and promote employment on behalf of disadvantaged groups) and through greater involvement of organizations active in the region (such as provincial administrations, communal administrations).

### **2.3 50. The Kleinood Foundation: deployment of retired ex-entrepreneurs (Netherlands)**

This Foundation, which was set up by a number of large companies, advises entrepreneurs in the medium-sized and small business sector. Its aim is to offer help free of charge to small-scale entrepreneurs who want a sounding board for discussion of future developments in their company, who are in difficulties or who have questions about the progress of their company. This objective is achieved by using experienced people who have retired early from industry. A pool of ex-entrepreneurs make their knowledge and experience available free of charge to their active younger colleagues.

The Kleinood Foundation advises entrepreneurs in the medium-sized and small business sector. The Foundation was set up in 1979 by a number of large companies on the initiative of the late Professor J. Klevering. The underlying idea was there would be a growth of employment in medium-sized and small businesses and that there would be a growing demand for knowledge and experience.

The Foundation's aim is to offer help free of charge to small-scale entrepreneurs who want a sounding board for discussion of future developments in their company, who are in difficulties or who have questions about the progress of their company. This objective is achieved by using experienced people who have retired (early) from industry. Under the motto 'the big help the small and the old help the young', a pool of ex-entrepreneurs was assembled who were to make their knowledge and experience available free of charge to their active younger colleagues.

At the moment there are approximately 190 ex-entrepreneurs, directors, managers and specialists ready to provide assistance through Kleinood. The ages of the consultants range from fifty-year-olds to seventy-year-olds, and according to the director Mr Booijen it is striking that the group of those in their fifties rises annually. Basically Kleinood advises all small and medium-sized companies (up to 100 staff) in the country who are unable to enlist the services of a professional consultant. Industry recognises the importance of this type of support for medium-sized and small



businesses. This is clear from the many larger organisations (some 40 in all) and the Ministry of Economic Affairs which sponsor Kleinood annually.

The following results were achieved in 1993:

- 1924 requests for advice were submitted, a rise of over 27 per cent compared with the two years before;
- the companies advised by Kleinood employed a total of 9500 people, 92 per cent of whom came from the medium-sized and small business sector;
- more and more new businesses are using Kleinood consultants; 56 per cent have been established for less than six years;
- most of Kleinood's clients come from the trade, hotel and catering and repair sectors (42 per cent);
- the problems to which an answer is sought are mostly in the area of marketing/turnover and finances, followed by organisational and management problems;
- 36 per cent of the consultants believe that due to their involvement through Kleinood the problems have been solved and 65 per cent adjudged that their help was at least of some use.





## Chapter Three

## Training Initiatives

### **NEW TRAINING PROGRAMMES FOR OLDER WORKERS**

**2.1**

#### **51. De Klink vzw (Belgium)**

**2.2, 3.2**

This is an occupational residential home. A large number of flexible working time arrangements are possible. This is particularly appreciated by employees with children and older employees. All workers are encouraged to take regular in-service training.

De Klink (Diegem) is a registered charity. It is an occupational residential home where 40 adult mentally handicapped people are accommodated. These people, divided into four age groups, are supervised and helped to accomplish a meaningful programme of work. Half the occupants are aged 50 and above.

Nine men and 39 women are employed in the institution, of whom approximately two thirds work part-time. A large number of working patterns are possible: some work 13 hours, others 17 hours, yet others 23 hours, and so on. The flexibility of the programme is particularly appreciated by people with children and older employees. Approximately one quarter of the age- group helpers are over the age of 40. Since tutors cannot generally continue their work for 40 years, De Klink pays particular attention to the creation of a favourable working climate for all helpers, young and old.

This is reflected for example in the encouragement of in- service training activities. All helpers are encouraged to take regular in-service training. This activity can be organized both internally and externally. In the latter case the person is expected to compile an internal report of the course

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he/she is following. The annual budget set aside for this in-service training is regarded by the management as well spent, because this additional training contributes to the motivation of tutors. Indeed in some cases attendance at such courses by helpers is compulsory for the older members of staff as well.

Another element that has a favourable effect on the atmosphere at work is the process of consultation involving all employees. The charity endeavours to take as few decisions as possible over the heads of the staff. For that reason the staff are involved as far as possible in the conduct of policy. A concrete example of this is that in the recent past there were joint discussions on plans for extending the facility to accommodate ten new occupants. In this process, for example, account was taken of suggestions made by the age- group helpers and the cleaning team on plans regarding sanitary facilities.

## **52. Grace NV (Belgium)**

This is an industrial producer of absorbent materials for radar and polymers for the electronics industry. The company has a bridging pension scheme for employees aged 58 and above. In addition five hours of theoretical and practical training are devoted annually to older employees specifically. During this training, which is not compulsory but is strongly advised, company employees learn the basic principles of new or modernised machines.

Grace NV (Westerlo) is an industrial producer of absorbent materials for radar and polymers for the electronics industry. The company has 112 employees, all working full-time and with a balance between men and women. Approximately 10 per cent are aged 45 and above. The company has a bridging pension scheme for employees aged 58 and above.

Five hours of internal training are devoted annually to older employees specifically. This training consists of two parts: a theoretical and an on-the-job section. During this training, which is not compulsory but is strongly advised, company employees learn the basic principles of the new machines (such as a special sawing machine) or of those which have been recently modernized. Particular attention is paid to directions for use and safety regulations. In this way older workers are given the opportunity of bringing themselves up to date with the newest technologies in the field of capital goods.

## **53. Keller GmbH - Skills training, multiplier courses and technology training for older workers in small and medium-sized companies (Germany)**

This metal processing company has introduced IT skills training courses for older workers. One training programme took the form of an eight-week course. During this period the course alternated between one-week theory sessions and a one-week practical session when the applications were applied in the workplace. The courses were designed so that there was a close interplay between the existing experience of the older skilled workers and the new



technical skills to be acquired. In multiplier courses, experienced skilled workers were taught how to provide in-house training to workers at their own plant. In addition, the company has developed a completely new technical control concept. In the new system the operator can choose between various methods of operation.

Keller GmbH is a metal processing company with its main location in Wuppertal. The company has a workforce of about 200. As part of a pilot scheme funded by the German Federal Ministry for Research and Technology entitled 'The stabilization of older workers in small and medium-sized companies' Keller GmbH ran a total of three programmes, which in part were expressly targeted at older workers:-

- design of CNC training courses, particularly for older skilled workers and implementation of a pilot training scheme,
- design and implementation of multiplier courses to provide training expertise to small and medium-sized companies and
- design and development of help and training modules for software application.

The training programme for older skilled workers took the form of an eight-week course. During this period the course alternated between one-week theory sessions and a one-week practical session when the applications were applied in the workplace. The courses were designed so that there was a close interplay between the existing experience of the older skilled workers and the new technical skills to be acquired. It was designed to ensure that all participants, including those aged 50, could make the transition from a traditional turning and milling machine to a computer-controlled machine tool.

In the multiplier courses experienced skilled workers were taught how to provide in-house training to workers at their own plant. For example they were shown how to represent the training content as clearly as possible and thus improve their ability to instruct older skilled metalworkers. In addition they were taught how to deal with possible learning difficulties and acquainted with the principles of methodology and didactic planning.

As far as the third initiative was concerned the use of help modules within the software, designed to support older skilled workers in the process of learning new machine techniques, was found to be an inadequate tool. Instead the company developed a completely new technical control concept - in part in cooperation with other companies. In the new system the operator can choose between various methods of operation. In addition the separation between planning and implementation has been eliminated and the ability to add modules to cover minor innovative processes provides a continuous learning process for the user.

The company considered that the measures provided them with a major opportunity to convey future-oriented production concepts to older workers as well. At the same time the integration of older workers in the CNC training measures and their training as multipliers has also increased the likelihood that their experience could be retained and developed.

#### **54. Leica GmbH - Experience-based learning for older workers in the form of training discussions (Germany)**

This photographic and optical company has been involved in a project which has targeted training at older skilled workers. The training was designed to impart the skills required to use CNC machine tools. The scheme uses an experience-based learning process and aims to build on existing technical skills. Its central element is the learning discussion. These discussions are intended to provide support to the participant as they try to solve problems. In addition, learning situations are created in which a specific task has to be mastered. This is backed up by information discussions with personnel managers. The latter play an important role in motivating workers and also in their subsequent deployment in jobs commensurate with their skills.

Leica GmbH is a photographic and optical company with its base in Wetzlar. It has a current workforce of approximately 1,000.

The company acted as anchor for a pilot scheme funded by the Bundesinstitut für Berufsbildung [German Federal Institute for Vocational Training] and the Minister für Wirtschaft, Verkehr und Technik for Hesse [Minister of Economics, Transport and Technology] entitled 'Experience-based Learning'. The purpose of the project was to provide small and medium-sized companies with a training product which was feasible in terms of cost and internal work schedules and seemed appropriate for the target group of older skilled workers. Leica's Education and Training Department was commissioned to develop an appropriate training concept, to inform small and medium-sized companies of it and if necessary to provide workplace training as part of an inter-company network.

The training measures were targeted at older skilled workers. All participants had successfully completed vocational training which qualified them to work on conventional turning and milling machines and also had many years of experience behind them. The training measures were designed in particular to impart the knowledge and skills required to use CNC machine tools.

In terms of methodology the scheme used an experience-based learning process and sought to build on existing technical skills. Its central element was the learning discussion. These discussions were intended to provide support to the participant as they sought to solve problems on the basis of their previous experience. In addition learning situations were created in which a specific task had to be mastered and during this process participants were able to develop their existing skills and acquire new ones. This was backed up by information discussions with personnel managers. The latter played an important role in motivating workers and also in their subsequent deployment in jobs commensurate with their skills. The instructors providing the training were acquainted with the principles of experience-based learning during a special workshop.

Leica GmbH has provided certain information on the results of one training programme. The course in question had nine participants, of whom seven were 50 or over and two were aged 40. Apart from one participant all had successfully completed vocational training in metalworking but had no experience of additional job training in recent years. The use of an experience-based learning approach was not without its problems. On the one hand by incorporating experience into the learning process a constructive use could be made of it to initiate the process of retraining and to highlight the differences in the operation of the new machine tools. On the other hand, however, existing experience acted as a constraint because it generated a fear of making a mistake and participants were often unable to express this fear adequately in words. However overall the participants found the experience personally satisfactory and considered that it helped to improve their situation at work.

### **55. Rohrwerke Muldenstein - Planning of non-age-specific workplace design and training suitable for all age groups (Germany)**

This company is developing rehabilitation and preventive measures to reduce 'wear and tear' on workers. At the same time it is attempting to familiarise the workforce with a wide range of working methods. Key features of the project are as follows: the introduction of group workstations which allow a systematic rotation of jobs and so reduce overall stress levels; expansion of the content of jobs; tailored training measures for older workers which build on existing professional experience; establishment of working conditions which take account of recent developments in ergonomics; reduction of the minimum health requirements; increased flexibility in the way staff are deployed; and use of health and quality circles to establish job structures which minimise stress levels.

Rohrwerke Muldenstein GmbH (RWM) was created in 1991 from the former East German company Rohrwerke Bitterfeld GmbH and is now a subsidiary of Stahlwerke Bremen. As part of a restructuring process the workforce at the Muldenstein site was reduced from 580 to 360. The majority of those who remained had completed a technical training. The percentage of those aged over 50 now exceeds those under 30 and, assuming no replacements, almost one in two employees will be over 50 by the year 2003.

In view of the above age structure the company decided that it had to develop compensatory rehabilitation and preventive measures to reduce 'wear and tear' on workers thus extending their working life and preventing the threat of a potential 'reduction in performance levels'. At the same time it sought to familiarize the workforce with a wide range of new products and processes - quality assurance and computerized process control. Of the objectives specified in the project 'Non-age-specific workplace design at RWM', a project promoted under the auspices of the Work and Technology Programme, the following should be noted:

- to introduce group workstations which will allow a systematic rotation of jobs and so reduce overall stress levels. To enhance the skills and flexibility of the workforce by expanding the content of their jobs;

- to offer specific training measures for older workers and adults not used to the learning process. The training should build on existing professional experience, harness existing empirical knowledge and be specifically tailored to the demands of their future jobs so as to encourage the motivation and development of the workforce;
- to establish working conditions which take account of recent developments in ergonomics and which, as far as is possible, are compatible with age and health and at the same time to prevent health problems developing in younger workers and those whose health is as yet unimpaired. At the same time to reduce the minimum health requirements and increase flexibility in the way staff are deployed;
- through the use of health and quality circles to establish job structures which minimize stress levels and so make it possible to use the diverse experience of older, disabled and non-disabled employees.

These guidelines on the format of the working and learning processes were agreed jointly by Management and Works' Council and were then translated into detailed plans. In this way the employees were drawn into the cooperative process on the lines of participation training. The project is now moving from the planning to the implementation stage.

### **2.3 56. Schwedische Kugellagerfabrik - Age- specific training in the manufacturing industry (Germany)**

This supplier to the automotive industry has offered two training courses to employees in the 44-55 age group: one for commercial staff and the other for industrial/technical staff. The courses aim to impart specialist knowledge and expand the social skills of participants in order to facilitate the introduction of group working. The three theory stages of the training last between 80 and 90 hours. By using experience-based learning, the programme aims to utilise older workers' experience. Participants are divided into small groups both for learning purposes and for working out solutions to problems. The group sessions are intended to improve verbalisation skills and encourage a consensual style of working. In the interval between the three theory stages participants return to their work in the company. This allows them to apply the skills they have acquired in the company situation as well as preventing information overload.

The Schwedische Kugellagerfabrik (SKF) is located in Schweinfurt, Bavaria and is the German subsidiary of a Swedish group. It is one of the main suppliers to the automotive industry and has a current workforce of about 5,000.

In general the area where the company is located is dominated by the automobile supply industry. Because of the economic problems experienced by the entire automobile industry in 1993 and 1994 almost all suppliers had to shed workers. However SKF tried to manage the structural crisis mainly through changes in the organization of jobs and training rather than through redundancies so that it could at least retain its core workforce. The scientific management structures based on

the Taylor system were replaced by group working and as a result the workforce had to be trained to perform additional technical and organizational tasks.

The company felt that older workers possessed a wide range of operational experience which was of value to them and that after appropriate training they would be well able to handle the new tasks. The resultant training programme formed part of the project 'Development and monitoring of training programmes for older workers in the manufacturing industry', which was funded by the European Social Fund (ESF) and the Bundesinstitut für Berufsbildung (BiBB) [German Federal Institute for Vocational Training]. The training programme was developed and implemented in conjunction with the Beruflicher Fortbildungszentrum (BFZ) [Vocational Training Centre] run by the Bavarian employers' federations. The company released the employees for the training and continued to pay their wages during this period.

In all two training courses were offered to employees in the 44-55 age group: one for commercial staff and the other for industrial/technical staff. In addition to improving their specialist knowledge by imparting recent theoretical and practical know-how the training was also designed to expand the social skills of participants to facilitate the introduction of group working. The entire programme was divided into three theory stages of about 80-90 hours which means that in comparison with similar measures, it was relatively extensive.

The need to take account of the special learning needs of older workers was an important element of the training concept. By using experience-based learning the programme sought to tap into their existing experience and to make participants aware of its position in the wider theoretical context. Specific visual aids were used and a gradual conceptualization was carried out. As an integral part of the course the participants were divided into small groups both for learning purposes and for working out solutions to problems. The group sessions were intended to improve verbalization skills and encourage a consensus style of working. In the interval between the three theory stages participants returned to their work in the company, in each case for a period of six weeks. This allowed them to apply the skills they had acquired in the company situation. It also prevented an information overload ie participants were not required to cram in excessive amounts of material.

Some 10-15 older employees participated in each of the two programmes: their average age was about 45. During the entire programme the absence rate was zero and this unusual fact is cited by the training organization as evidence of the high acceptance level amongst participants. The initial fears of older employees on being confronted with a new learning situation were largely dispelled, something which was confirmed by the participants themselves. Moreover there is now a greater willingness to undergo further training. The full course content was imparted to participants. However it was impossible to achieve an optimum success rate because the continuing reorganization within the company meant that the newly acquired skills could not always be applied adequately in practice. In this matter there should have been better coordination between the implementation of the training and the deployment of workers by the company.

## 57. Institute for Labour Research - Greek Trades Union Confederation (Greece)

The GTUC (GSEE) and the Institute of Labour Research have initiated a programme of Training of Trainers which is of particular benefit in the teaching and training of older workers to enhance their professional qualifications and to open up new employment opportunities in the area of their job specialisation. GSEE wanted to use the experience and knowledge of trainers and older workers in a positive way, feeling that older experienced workers should not simply be 'receivers' of training. The majority of those who received training as trainers have secured employment.

Participatory training is rather a new concept in Greek education and training institutes which are normally very traditional in their methods. GSEE wanted to use the experience and knowledge of trainers and older workers in a positive way, feeling that putting older experienced workers at desks was quite inappropriate and they should not simply be 'receivers' of training.

Each year for the past 3 years they have trained approximately 80 trainers yearly, mainly workers or skilled unemployed from various sectors such as textile manufacture and food processing.

Initially they started the course in 1991-2 in co-operation with the AMUS Centre in Copenhagen. Since then they have developed a considerable amount of teaching materials and produced a book in which the philosophy and methods (brain-storming, work groups, case studies, role playing, project work etc.) used in participatory learning are clearly set out for all trainers/trainees.

In 1994 they trained 60 trainers from OAED schools (apprenticeship and rapid training for adults) in the methods of participatory training.

They have also been involved in the training of 2,000 workers and unemployed people over the past three years. Nearly all activities are related to the Athens area but they are opening regional branches for all 13 regions and these regional institutions will be using the same methods to train trainers as well as running training courses of other kinds.

As far as evaluation is concerned it appears that the majority of those who received training as trainers have secured employment. While some were originally sent by their employers, others came on their own account or as unemployed. A substantial proportion were over 50 years of age. They did not simply become trained in a specialised way but the form of training did not tire them, it inspired them and helped them considerably to use their existing knowledge in learning and developing further. Difficulties in learning this type of new teaching and training method had been experienced only with autocratic people who had difficulties in adjusting to the new methods and this was not related to age.



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## 58. Steel Company (Italy)

This major multinational company is involved in the machine-drawing and twisting of steel wire. In the early 1990s, the company lost a major order which resulted in a whole plant laying idle and overstaffing. Management rejected redundancies as an option. Instead, wishing to protect its image in the region, it decided to relocate at its own cost in other companies in the area all the staff employed in the plant regardless of age or professional position. Particular attention was given by company to low-skilled older employees as they were more difficult to relocate. It arranged for them to go on retraining courses for approximately six months on full pay within the companies interested in taking them on. Furthermore, to help staff starting up business on their own, the company decided to donate a minimum amount of technological equipment providing them with the basic means of production.

This company is part of a major multinational involved in the machine-drawing and twisting of steel wire. Based in northern Italy, it was founded at the beginning of the century and has subsequently developed firm roots in the surrounding region.

In the early 1990s, the company, which employs about 500 people, suffered an unforeseen setback by losing an important order from another company in the group. This resulted in an entire production plant being left idle and almost 50 per cent overmanning. The average age of the total workforce (247 people) was around 44 (approximately 20 per cent aged over 50) most of whom (64 per cent) had extremely specific professional skills.

The simplest way for the company to solve this critical situation was to use the traditional forms of dismissal and redundancy incentives provided for under the law (traditional social security benefits such as the Integrated Earnings Fund, mobility register and, above all, early retirement in view of the age of the employees involved). However, wishing to protect its links and its image in the surrounding region, the company decided to relocate at its own cost in other companies in the area all the staff employed in the plant regardless of age or professional position.

The method chosen was that of directly involving the staff concerned, with the support of an outside agency specializing in collective outplacement, and all the private and public institutions in the region (trade union associations within and outside the company, employers' associations, companies, local and public authorities, etc). Particular attention was given by the company to low-skilled older employees as they were more difficult to relocate. It therefore arranged for them to go on retraining courses for approximately six months on full pay within the companies interested in taking them on. Furthermore, to help staff starting up business on their own, the company decided to donate a minimum amount of technological equipment providing them with the basic means of production.

At the end of the exercise, which lasted about two years, of the 247 people involved in outplacement, only 12 preferred not to relocate and remain on the Integrated Earnings Fund until they received a pension.

As in the case of Zanussi, the experience of this company shows how external flexibility can be managed through the development of self-management principles. Moreover, this shows that to achieve a positive outcome professional training alone is not sufficient. The involvement of the surrounding industrial infrastructure is equally important.

## **59. Province of Modena and Province of Ravenna (Italy)**

Both these provinces have measures in place which are designed to assist people wishing to return to work. Recently the province of Modena ran two retraining courses for women aged over 25 who were interested in returning to work. The province of Ravenna, in addition to organizing two careers guidance courses for women aged over 25, makes a financial contribution to companies who supply a tutor for three weeks for a new employee aged 35+ taken from the unemployment register. Should a company make a request for further training (for example, a requalifying course), provision exists for an hourly payment per trainee up to 300/400 hours. In addition, a trainee may follow a course given by a company tutor for up to six weeks with an additional financial contribution.

The provinces of Modena and Ravenna are part of Emilia Romagna, a region in north-east Italy reliant on SMEs which are technologically innovative and clearly geared to international markets. For this reason, the area escaped the economic recession of the early 1990s almost unscathed (unemployment rate in 1994 was a little over 6 per cent).

Emilia Romagna is one of the most active regions in terms of professional training and uses almost 20 per cent of the European Union's funds paid to Italy (in 1994 the region spent 282.6 billion Lire on training for a total of over 4,000 courses involving 70,000 participants). More specifically, as regards measures to keep older employees in work at regional level, the initiatives promoted by the provinces of Modena and Ravenna are of particular significance.

Apart from the general aims of employing more resources to reskill older workers explicitly stated in the '1994-1997 programme for professional training and guidance', the province of Modena carried out in 1993/1994 two retraining courses for women aged over 25 who were interested in going back to work. The courses, which lasted roughly an equivalent of 240 hours, were followed by 19 and 18 women respectively aged between 29 and 50.

In 1993 the province of Ravenna, in addition to organizing two career-guidance courses for 30 women aged over 25 similar to those organized by the province of Modena, signed with the Provincial Labour Office, the communes, the Chamber of Commerce and the social partners (employers' associations and trade unions) a 'Two-year protocol on cooperation to support the development of local employment' which contains provisions for unemployed women on the



mobility register aged over 35. Provision is made for employment supported by training. The provincial authority makes a contribution (up to a maximum of 3 million Lire) to the companies concerned who supply a tutor for three weeks for a new employee aged 35+ taken from the mobility register. Should a company make a request for further training (for example, a requalifying course), provision exists for an hourly payment of 25,000 Lire per trainee up to 300/400 hours. In addition, a trainee may follow a course given by a company tutor for up to six weeks with an additional contribution up to a maximum of 6 million Lire.

Apart from those involved in this initiative so far (about 100), this measure stands out from those taken at national level insofar as it attempts to create a training environment directly in the workplace. This system has been used successfully in the USA for the rehabilitation of people with physical and mental handicaps.

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### **60. Fontijne Holland: training of production workers aged 40 and above (Netherlands)**

This company has set up of a refresher course in ‘workplace technology’ for staff aged 40 and over. The course is intended for older employees who have not attended a course on the production process for a considerable time, feel less involved in the production process, want to study new techniques in depth or expand their professional knowledge. Those attending the course are expected to show commitment and motivation, since two-thirds of it takes place in employees’ own time.

Fontijne Holland employs 153 staff, with an average age of 32. One third (31 per cent) of the workforce belong in the over-40 category. There are 18 employees over 50. Fontijne Holland is a company where education and training have been well catered for, particularly with younger staff. However, one result of this was that older staff became increasingly sidetracked. They were not kept up to date with technological advances and this often adversely affected their involvement in the production process. Their enthusiasm and personal contribution to the work declined. Increasingly they asked the question: ‘Why them and not us?’ The organisation reacted well to those signals. The signals, the fact that people are going to be employed for longer and longer in organisations and the increasingly heavy demands in the field of theoretical and practical skills led to the setting up of a refresher course in ‘workplace technology’ for staff aged 40 and over in the organisation.

The course is intended for older employees who:

- have not attended a course on the production process for a considerable time;
- feel less involved in the production process;
- want to study new techniques in depth or expand their professional knowledge.

Those attending the course are expected to show commitment and motivation, since two-thirds of it are given in employees’ own time. Fontijne Holland’s aim in this course is to raise the level of

technical and practical skills and also to increase the involvement of older staff in the company and the production process.

### **61. Waterleiding Friesland (Friesland Water): company training for the over-40s (Netherlands)**

This company has launched a course for fitters aged 40 and over. A shortage of fitters and a surplus of assistant fitters is anticipated in the future. Instead of recruiting younger, better qualified and hence more expensive workers it was decided to train the existing workforce. The pace of the course was adjusted to the questions and the level of those taking it.

The company has launched a course for fitters for the over- 40s. At 44 the average age in this company is relatively high. Seventy per cent of the workforce are over 40. Given the present age structure a shortage of fitters and a surplus of assistant fitters is anticipated in the future. Instead of recruiting younger, better qualified and hence more expensive tradespeople it was decided to train the existing workforce. A district manager said:

No, getting rid of surplus assistant fitters and taking on younger, better qualified people just doesn't fit in with our company culture.

An in-company course for fitters was set up. 22 of the total of 31 assistant fitters began the course. The age of those on the course ranged from 40 to 55. Although the course was not compulsory some pressure was exerted. According to one teacher 'it was needed, because in the beginning there was enormous apprehension about doing the course'. The pace of the course was adjusted to the questions and the level of those taking it. Comments from course students were:

I didn't want to do it at first, so they had a word with me. I thought I was too old, and I do find it quite tough. When you've been away from it for so long, it's pretty hard taking up where you left off.

What you usually hear from other older staff is 'I'm past it'. But they shouldn't worry about their age. It's perfectly possible like this.

Those on the course also appreciated the fact that students were all on the same level. The feeling was that learning was more fun in a whole group: people learned from each other and helped each other.

For the company there are costs and benefits attaching to the policy. In addition to the training costs there are wage costs which continue during the course. In addition wage increases play a part since the wage differential between an assistant fitter and a fitter is reduced. Apart from that, the course does not itself guarantee that someone will be able to work independently as a distribution fitter. Questions have also been raised in the minds of participants as to the outside value of this company-specific course.



The benefits are harder to express in financial terms, but the company certainly expects them from the fact no new people will have to be recruited (reduced costs for recruitment and selection), that it will be possible to continue for longer with the present workforce and also benefit from one's own experienced and hence qualitatively better trained staff. The intangible value resides mainly in the increased self-esteem of the people themselves, the removal of discontent at the differential between assistant fitters and fitters when in practice the former often did the same work.

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## **62. Heineken Nederland Beheer BV: training for senior managers (Netherlands)**

Heineken Nederland Beheer has developed two workshops in management techniques for managers aged 40 and over which aim to increase their flexibility, mobility, employability and willingness to change. Development interviews are carried out with all staff including older workers. In addition, Heineken plans to introduce flexible retirement, for which there is great enthusiasm among staff.

Heineken Nederland Beheer has 5,000 staff, with an average age of 40. Some 2450 members of staff, or 49 per cent, are over 40. Heineken's view is that it is not technology but people that brew beer. That is why Heineken wants to be able to call on high- quality staff. Consequently a great deal of attention is paid to education, training and refresher courses. Two workshops have been developed especially for managers over the age of 40 which aim to increase their flexibility, mobility, employability and willingness to change. Improved mobility is the (measurable) aim for which all kinds of other instruments have been devised at Heineken. For example, a two-year pilot scheme is currently in progress in which potential is assessed by means of interviews with every employee (hence also the older ones). On the basis of these interviews a personnel schedule is drawn up in which older staff are also involved. If the latter have capabilities and if they themselves are interested, then a new job is definitely a possibility. In addition Heineken plans to introduce flexible retirement. A survey has been carried out among staff for this purpose. Approximately half turned out to be enthusiastic about the idea. A large group turned out to be satisfied with present pension schemes, while 20 per cent were prepared to sacrifice money now in order to obtain early retirement later. The two courses mentioned are:

**The Senior Management Workshop:** the most important aim is to develop personal effectiveness ('look at the world/look at yourself/look at your staff'). It is not technology but people who are the centre of focus in this course. A great deal of attention was paid to staying in good physical condition. Participants reacted positively to the fact that the course was intended for senior managers. This created a 'feeling of understanding', something that is missing in a course for various ages. People also felt that the emphasis on people in this course was original.

**Advanced Management Course.** The course contains elements like personal activity and effectiveness. In terms of content there is an examination of how one can persuade staff to change and how one can deal with generational differences in one's department. People

found the course very rewarding. A participant: 'Many of those taking part may have found it strange having to attend yet another course when they thought that they'd got somewhere ages ago. But that view soon changed. This course was very good for overcoming your fear of starting something new, of changing, that's the nice thing about it.' With this course too people liked the fact that all participants were the same age.

Both programmes were evaluated by the participants. This evaluation is used for constant fine-tuning of the programme. The training programme is also evaluated with Heineken's so-called 'customer forum' (the managing directors of the operating companies). Testing is based on the reactions of participants and on the reaction of the 'bosses' to the carrying out of certain projects as part of the course.

From a cost-benefit perspective the change of attitude brought about by the courses is experienced and appreciated as positive. According to the company a clear internal and external improvement in mobility has been achieved, which produces benefits both for the company and for individuals. No intangible costs were observed. As far as the material benefits are concerned, the company has calculated that the course will pay for itself for every sixteen people who stay at work for one year longer instead of claiming sickness benefit and later Invalidity Act benefits.

### 1.3, 2.1, 3.2, 3.6, 3.7, 5.8 **63. Life Assurance Company (UK)**

This organisation decided to target older workers in response to labour shortages. Recruitment advertisements have stated that the organisation welcomes 'mature' applicants. Age is mentioned in the organisation's equal opportunities policy and its manual for managers states that they should ensure that induction and training appropriate to the specific needs of mature entrants is provided. This includes confidence building and showing them that many of the skills they had used outside of the organisation were relevant to the world of work. If there is a business need staff can work on past the normal retirement age. The organisation also operates flexible working hours.

This commercial company provides life assurance, pension and unit trusts. It employs 1071 men full-time and three part-time, 1092 women full-time and 58 part-time.

This company identified the problem of recruiting sufficient numbers of young people in 1985 and then began recruiting older people. Age is mentioned in the company's equal opportunities statement and the company's manual for managers states the following about older workers:

The group targets mature entrants, particularly women in their mid-thirties and above in order to capitalise on this important source of labour and supply and improve the age distribution of staff, and arrangements should be made to ensure that induction and training appropriate to the specific needs of mature entrants is provided.

86 The company has also recruited men who were previously industrial managers to do clerical work.



The company has seen a need to target training on older people and particularly re-entrants: building up their confidence and showing them they were doing things at home which were very similar to things they were doing at work. These staff were shown that they were taking many similar decisions in the world outside work to those that they would make in the workplace.

The company has found that when older people who have been brought in have left relatively quickly, this is sometimes due to the attitudes of supervisors who are uncomfortable with dealing with mature people, particularly when they themselves are very much younger. Consequently counselling and coaching has been provided for each supervisor, and in one instance, the company has taken severe disciplinary action against a supervisor.

Recruitment adverts state that the company would welcome applicants from 'mature' people. The oldest person recruited was aged 60 years although the company prefer a five year gap between the age at which they recruit someone and the normal age of retirement which is 62 years. However, if someone wants to stay on after the age of 62, and there is a business need, then they are allowed stay in the job until 65 on a year by year basis. After that staff can come back as temporary workers. The company also encourages local training colleges to run courses for people considering returning to work.

The company operates a policy whereby staff not wishing to relocate to another geographical area are kept on the books for six months rather than be made redundant while they seek alternative employment within the company.

In addition, the company has now dropped qualification requirements and replaced these with psychometric testing of applicants.

The company employs dedicated Saturday or evening workers, who only work at these times. They tend to be women with children or ex-staff. The company also employs staff working for two or three days per week depending on the specific requirements of the job.

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## **EXTENSION OF EXISTING TRAINING PROGRAMMES**

**2.2**

### **64. Regional Bank (France)**

**3.6, 4.3,  
6.2**

This organisation has reduced staffing substantially over the last few years through redundancy and early retirement schemes. However, the latter have now been abolished. Training is available to all staff regardless of age provided they show commitment and the course relates to their professional future. No age restrictions are applied. Pairing a younger worker with an older one is a frequently used training method.

The Regional Bank corporation is a substantial banking business, and part of a group operating in the competitive personal banking sector. It employs over 2,500 people in branches located in both rural and urban areas. There is a high proportion of female staff, and a preponderance of

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employees in the 35 to 44 year age group (almost 50 per cent). Part-time working is fairly extensive (9 per cent of personnel).

Staff numbers have been reduced substantially, albeit gradually, over the last ten years in response to intensified competition, developments in the professions, and increased computerization. Staff reductions have been accomplished through redundancy schemes and, until 1993, established early retirement procedures. These were abolished from 1994 onwards. Part-time working has also helped to reduce staff numbers.

Training and labour mobility are major contributors to the ongoing adaptation of the workforce to the bank's requirement for trained personnel. Training has facilitated the computerization of the duties of administrative personnel, and eased the internal reallocation of staff from the declining number of administrative posts into the rising number of commercial posts. Training is available to all staff provided they show commitment and the course relates to their professional future. No age restrictions are applied. Pairing a younger person with an older one is a frequently used training method. Geographical mobility is also very extensive, and serves the purposes of either selection for promotion or mitigating the peaking out in someone's career detectable after 40 years of age. However, it has only limited impact on the motivation of those over 45 years of age inasmuch as these employees are reluctant to be relocated on family and financial grounds.

Improvement of working conditions focuses upon working hours, with opportunities for staggered working hours and part-time working. These are not intended specifically for older staff but more for female staff.

1.2, 2.1,  
2.4, 3.2,  
3.6, 3.8,  
4.3, 6.4,  
7.3

## 65. Manufacturer of Insulation Materials (France)

This company specializes in the manufacture of insulation materials for the electro-technical industry. The company has been awarded a government grant to retrain older workers. Each new employee is provided with a mentor previously inducted in teaching techniques. The company has also introduced a policy of reducing the arduousness of tasks with a view to preventing the premature ageing of staff. Improvements take two forms: physical (installation of a lifting table, shower rooms); and mental (work on ergonomics to lighten the mental workload of operatives). Furthermore, an early retirement scheme has been replaced by a phased early retirement scheme although there have been difficulties in rearranging working hours.

'Insulation & Co' is a subsidiary of a Swiss company, and is located in Delle (in the vicinity of Belfort). It specializes in the manufacture of insulation materials for the electro-technical industry. From 1988 onwards the company has diversified its product range (thermal insulation materials are no longer the only product) and has begun both to export and import goods (South East Asian markets). The company owns three factories, one manufacturing laminates, a second specialising in insulation materials for copper, and a third producing mica paper.

The group as a whole employs 6,500 people. In 1994 'Insulation & Co' itself employed 582 people, of whom 59 were managers (i.e. 10 per cent of the workforce), 190 clerical staff, technical staff, and supervisors (34 per cent), and 333 manual workers (56 per cent). The majority of staff are male (76 per cent). The company enjoys a low rate of staff turnover: 40 per cent of employees are over 45 years old, and the average length of service is 20 years. Twelve and a half per cent of staff are over 55 years old.

The average age of staff is 42 years, but this is expected to rise in the years ahead. Conscious of the problem, the company has devoted thought to it, and in 1992 was awarded a renewable annual grant by the National Employment Fund to retrain ageing staff for extended employment. The grant was made available to applicants under the terms of the programme operated by the Ministry of Employment and Vocational Training entitled: 'Age and working life: facing up to advancing years'. The management of an ageing workforce has since become an ongoing concern in the sense that the company takes care to ensure that age is not employed as a pretext for exclusion.

The company has thus increased the range of training programmes available to the entire workforce, including those not in receipt of training for several years past. The company devotes between 4.5 and 5 per cent of its staff overhead to training. All newly recruited personnel receive training both in the company's products and in movement and posture. Training covers 5 themes: safety; quality; improvement of internal communications (suggestion panels have been installed in every workshop); and technical information. There are no age restrictions for training, which involves everyone, even those on phased early retirement. There is also an apprenticeship scheme for training workers recruited at CAP level as fitters or enamellers. Each new employee is provided with a (volunteer) mentor previously inducted in teaching techniques.

The company has also developed an active policy with regard to the improvement of working conditions, particularly on the presses, with a view to reducing the arduousness of tasks and preventing the premature ageing of staff. Improvements take two forms: physical (installation of a lifting table, shower rooms); and mental (work on ergonomics to lighten the mental workload of operatives). The policy on improving working hours is yet another important element. Improvements are made whenever a conscious need arises, and are revised annually by management (there are many different arrangements for working hours).

Furthermore, after having used the early retirement scheme (full early retirement), the company introduced phased early retirement from 1994 onwards, and 30 people are currently affected by it. The phased early retirement system has been adapted so that participants work 80 per cent of normal working hours during the first years so that they can be released in the last year, i.e. at 59 years of age. This is one of the concessions which the company has granted to such staff. Staff actually expressed the wish to leave earlier at the age of 56 years, taking full retirement as had formerly been the practice, rather than continuing to work part-time for the company until age 60. The rules for admission to the phased early retirement scheme are simpler, and management regards it as one which avoids the trauma of dismissals, obviates the need for abrupt severance, is socially acceptable, and allows people to leave gradually whilst training their successors, so that

skills are not lost. The company therefore opted for this solution. The only drawback is the need to rearrange working hours, not a simple matter for work in the continuous furnace workshop.

In the area of recruitment, current practice is to take on young people, although there is no obstacle to the recruitment of old employees. In 1991-1992, and induced by the special terms of the 'back to work' contract scheme, the company was able to recruit two employees over 50 years of age for manual positions, and appears to be well satisfied. The company nevertheless considers that an employee engaged in manual work is in decline from 50 years of age onwards as a result of diminished physical resilience.

'Insulation & Co' is conscious of the risks of exclusion on the grounds of age. It has therefore adopted a preventive policy which combines two approaches: the first devoted to measures connected with technological options, working conditions and the organization of work; and the second involving training measures to develop the professional development of the employees concerned. Yet to face up to the problems linked with the rising number of staff over 50 years of age, the company makes use of the phased early retirement system, and seeks to extend it. 'Insulation & Co' would actually like to develop 'compacted half-time' system for persons over 55 years, under which they would work full-time until the age of fifty-seven-and-a-half, but would be paid at half-time rates from age 55 to age 60. The company is also considering the introduction of end-of-service holidays.

## **66. Training Time Capital (France)**

The objective of the Training Time Capital scheme is to enable employees to participate in training courses available within their company's training plan so as to increase or broaden their level of training. Up to half the cost of training courses is borne by works councils, the remainder of the cost being borne by the company. The scheme is used to train poorly qualified employees and/or those having to learn new production techniques.

The Training Time Capital scheme is a provision of the Five-Yearly Act of 20th December 1993 and was established through the agreement on vocational training between the social partners dated 5th July 1994. The object of the scheme is to enable employees to participate, on request, in training courses available within their company's training plan so as to increase or broaden their level of training.

Funds allocated to the financing of training time capital may include up to 0.1 per cent of funds collected by official works councils. Up to half the cost of training courses will be borne by these bodies, the remainder of the cost being borne by the company itself.

The qualifying conditions for participation by employees and the procedures for implementation of training time capital (priority candidates, duration of courses, co-investment, etc.) are determined by local branch negotiations.



Examination of branch agreements concluded since 1994 reveals the concern of companies that the scheme be used to train poorly qualified employees and/or those having to learn new production techniques. The length-of-service requirement is usually set at a fairly low level. Training Time Capital can be recognized as a flexible instrument, although it is not yet possible to assess the value of the scheme, since branch agreements are still too recent.

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### **67. Vereins- und Westbank - Training older female staff through experience-based learning (Germany) 2.1**

This bank has introduced major changes to working practices resulting in a need for a considerable amount of re-training. Many staff are older women working in semi-skilled jobs. This has meant that training has had to be closely geared to their methods of learning. The company has favoured the principle of experience-based learning. In addition, the training has been given as close as possible in time to the date on which participants have been required to use the new skills.

The Vereins- und Westbank is a multi-purpose bank with its Head Office in Hamburg and has a current workforce of approximately 4,200 salaried staff. The average age is approximately 38 and 17 per cent of employees are 50 years or older.

In the course of major organizational changes to the inland payment system the bank introduced group working to replace the previous Taylor type of operation with its largely uniform and very repetitive tasks. As a result there was a need to disseminate background banking knowledge and provide training in social and other skills of relevance to their specific areas of work.

There were very few qualified banking staff among those working in the inland payments' section, who were predominantly older semi-skilled female workers. This meant that training had to be closely geared to their methods of learning. Wherever possible the company adopted the principle of experience-based learning. To implement this concept it linked in to the existing professional experience of participants or introduced pilot schemes. In addition the training was given as close as possible in time terms to the date on which participants would be required to use the new skills in reality and so avoid ineffectual 'training for a rainy day'.

The Training Manager expressed the view that the participants, including the older female employees, had developed a considerable willingness and ability to learn because account was taken of individual learning requirements and time extensions were also possible for individual phases. In addition the interaction between learning and working, whereby most of the learning took place in a group situation, was well suited to the needs of older female staff. An analysis by age group of the time taken to acquire the required skills showed that older staff were under-represented in the group who required most time. Similarly supervisors confirmed that older employees found it no more difficult than younger ones to master the new methods of working.

According to the company the training scheme was also successful in that it allowed the relevant staff to transfer to more attractive jobs in other departments of the company and so contributed to long-term job security. In addition the job enrichment meant that many of the stresses inherent in their existing jobs eg one-sided physical stress and social isolation, were reduced and so acted to prevent the development of health problems.

#### 4.1 68. Bayer AG - Integration of older workers in workplace-based training schemes (Germany)

This chemical company provides continuous training in a wide range of areas. These take the form of discussion forums, practical demonstrations and feedback sessions. A policy of allowing workers to structure their own training schedule has been particularly beneficial. In addition, the company has taken account of the findings of ergonomic research in its design of the workplace. In this regard, the recent introduction of a new five-shift system in selected locations has been found to reduce levels of stress. The company also has a policy of job rotation if workers are involved in tasks with a high repetitive content or where high concentration levels are required. A working group has been set up to monitor the effects on employees of new technology and new forms of production and the effects on older workers are given special consideration.

Bayer AG, a large chemicals company, currently employs some 35,000 staff at its main site in Leverkusen. Approximately 28 per cent of the workforce is 50 or over ie the percentage of older workers is considerably higher than it is in the economy as a whole.

In general the company considers that older workers behave more responsibly compared with younger ones and this makes them particularly suited to the control and supervisory tasks which predominate in the company (Pawlack 1992). Admittedly it has been found that older workers need more time to adapt when new technology is introduced, but once adapted their productivity is the same as that of their younger counterparts.

Bayer AG has not implemented any specific age-related initiatives in terms of workplace design or in-house training. However according to the company its existing arrangements and practices mean that older workers are included to a very large extent. It provides continuous training in a wide range of fields such as chemical engineering, electronic data processing, safety, etc. These training initiatives take the form of discussion forums, practical demonstrations and feedback sessions, which facilitate active participation wherever possible. This is in marked contrast to the traditional teacher/pupil approach with the teacher standing at the front and it allows a much greater use to be made of the operational experience of the older workers. Moreover workplace-based training programmes are offered to facilitate even further the learning of new technology. In addition voluntary evening courses are offered eg in computer skills and the take-up by older workers has been particularly high. According to the company the concept of allowing workers to structure their own training schedule has been particularly beneficial. Because of this approach the company has so far not found it necessary to set up special training initiatives for older



workers. The company expressed the view that such measures would run the risk of discriminating against older workers by conferring on them a special status.

In addition to the provision of training the company has taken account of the findings of ergonomic research in its design of the workplace. This is intended to prevent damage to health and to allow employees to remain at work despite the health constraints to which older workers are more prone. In this connection it has been found that the recent introduction of a new five-shift system in selected locations has reduced the level of stress. In addition the company has a basic policy of allowing workers to rotate between a range of jobs if they are involved in tasks with a high repetitive content or where high concentration levels are required, which may be a particular problem to older workers. A working group, consisting of representatives from the Works Council, management and internal specialists, has been set up to monitor the effects on employees of new technology and new forms of production and the effects on older workers are given special consideration.

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### **69. Hamburger Hafen- und Lagerhausgesellschaft - Non-age-specific training in heterogeneous learning groups (Germany)**

**2.1, 2.3,  
4.4, 5.1**

This storage and transport company has introduced training programmes for its workforce, a large number of whom are older workers. As well as acquiring computer skills participants also learned about the organisational context, and are taught skills which are outside the range of their specific function. To ensure the integration of older workers, the company has run refresher courses and more advanced sessions. The degree of difficulty of individual practical tasks is differentiated and the company makes available sufficient time to allow participants to complete the training course. Participants have been placed in mixed-age groups to avoid a stigmatisation of older participants and to facilitate the mutual exchange of expertise between younger and older workers.

The Hamburg Hafen- und Lagerhaus-AG (HHLA) is a large company owned by the Land of Hamburg. It has a workforce of about 2,000 and is the largest storage and transport company in the port of Hamburg. When the measures described below were launched the average age in the 'Import Storage' division was very high at 46 years, almost 75 per cent of the staff being older workers (45 years and over).

In response to changes in market demands in terms of service quality and flexibility the company was forced to reorganize the administration of its Import Storage division. As part of an extensive internal restructuring the company introduced computerized systems. In addition functions which had previously been operated separately were now integrated. The economic objectives of this programme were extended to incorporate human aspects and this element formed part of accompanying research funded by the German Federal Ministry for Research and Technology. This group of older workers was included in this research because of its high average age. The objectives were primarily to reduce the strains and stresses on workers and provide evidence that despite being older and unfamiliar with the learning process they could participate successfully in

computer training. The company endorsed these objectives because it was convinced that it would profit from the experience of older workers and that an investment in their training would be cost-effective. In addition a personnel policy based on younger workers would have failed because the appropriate skills were not available from the regional employment market.

The computer training courses which were provided for the service department of the Import Storage division were designed to upgrade skills and had a systematic specialist and technical content. As well as acquiring computer skills participants were also acquainted with the organizational context and taught skills which were outside the range of their specific function. To ensure that older workers unfamiliar with the learning process were integrated into the programme the company ran refresher courses and more advanced sessions. The degree of difficulty of individual practical tasks was differentiated and the company made available sufficient time to allow participants to complete the training course. Participants were placed in mixed-age groups to avoid a stigmatization of older participants and to encourage the development of social skills between the various age groups. It was also intended to facilitate the mutual exchange of expertise. Younger workers could impart computing skills to older workers and in return would profit from the older workers' industrial experience.

According to evaluations made under the accompanying research programme the provision of sufficient time prevented the older workers from being overtaxed and the link between theory and practice encouraged the learning process. The cooperation between individual age groups, one of the objectives of the initiative, was viewed as positive. More than half the 216 participants were older workers (45 years and over), all of whom achieved the target level of skills. On completion of the successful trial all courses were incorporated into the training programme of the HHLA's own training school and will be repeated regularly or as required.

#### **70. Industrie- und Handelskammer Chemnitz - Modular training for older workers in small and medium-sized companies (Germany)**

In the former East Germany a considerable increase in the number of small and medium-sized companies has led to a need for training which will enable their workforces to adapt to the changing demands of the market. The focus in this initiative is on teaching computing and commercial skills, the learning of new production techniques, and methodological and social skills. Recently, the training measures were modified to be more suited to the needs of older workers. As a result, there has been a closer link between practical and theory sessions and a wider range of teaching methods. In addition, refresher courses and more advanced sessions have been introduced.

In the former East Germany the structural changes in the economy, the associated drastic reductions in the workforces of large concerns and the establishment of many new firms in the technology and service sectors have brought about a considerable increase in the number of small



and medium-sized companies. These companies have a major need for vocational training with commercial relevance which will enable their workforces to adapt to the new demands of the market in terms of product range, product quality and a vertical range of manufacture.

This was the background to the development under the direction of the Chemnitz Industrie- und Handelskammer (IHK) [Chamber of Industry and Commerce] of the TINA Project (Trainingsnahmen zur Nutzung innovativer Arbeitstechniken) [Training in the use of innovative working techniques] which covered the Chemnitz/Erzgebirge/Vogtland regions of Saxony. The project is currently run by technology-related research and consultancy firms located at the Technology Centre in Chemnitz (the companies are Cadsys GmbH and Arbeit, Technik, Bildung GmbH). The focus is on teaching computing and commercial skills and the learning of new production techniques supplemented in all cases by the acquisition of methodology and social skills. The training is financed by funding from the European Social Fund and the Land of Saxony.

At the end of the initial phase of the project the training measures were modified and greater emphasis was given to the learning requirements of older workers. This was because older workers (including those unfamiliar with the learning process) made up an increasing percentage of those requiring training - at the outset training had been provided primarily to younger workers. In deciding what changes were required it was helpful that even during the initial phase of the project 30 per cent of the 230 participants were aged over 45 and 12 per cent were aged over 50. As a result it was possible to base the organizational and didactic framework of the training on the experience obtained from this initial group of participants.

As a result of this reorientation there was a closer link between practical and theory sessions, a wider range of teaching methods was used eg group working and self-study. In addition refresher courses and more advanced sessions were introduced, particularly to facilitate the acquisition of new and future-oriented techniques. There was also a greater use of performance evaluation after the completion of individual learning stages. Greater flexibility was introduced into the training schedule and the training was split into an even greater number of modules which were more relevant to individual needs.

According to the companies who are providing the training their initial experience using the revised approach has confirmed that the changes were appropriate. It has made it easier for older workers to draw on their existing experience and has increased their ability to learn. The continuous interaction between practice and theory, the principle of instructors visiting the workplace to provide application-related and workplace-based training, was considered by the older workers to be particularly important. In general the older workers saw the measures as an opportunity to safeguard their jobs and increase their specialist expertise.

#### 2.1, 4.4 71. Kabelwerke Wagner - Training of older foreign workers and the use of methods suitable for them (Training manual) (Germany)

As part of the pilot scheme this company provided training to unskilled and semi-skilled - and predominantly older - workers. The learning requirements of this target group were given special consideration and, as a result, a range of didactic methods was employed to disseminate new technical skills. The main focus was on application-related workplace-based learning. To limit demands on concentration, the training units were divided into several small blocks each of limited duration. In addition, individual groups were constituted so that each member of a group had a similar technical and linguistic knowledge or had a similar level of job experience. Participants were also provided with a training manual. This was developed specifically to reflect the particular language difficulties experienced by the older foreign workers.

Kabelwerke Wagner is located in Wuppertal and has a workforce of about 450. About 60 are skilled workers and some 250 are unskilled or semi-skilled. The proportion of foreign workers - primarily Greeks and Turks - is 40 per cent. The average age of the workforce, at 45, is very high and on average workers have been with the company for 11 years.

As part of the pilot scheme 'The training of semi-skilled and unskilled workers in small and medium-sized companies in the Bergisch urban area' the company provided training to unskilled and semi-skilled workers - predominantly older - as part of an internal pilot project. Its development was prompted by the introduction of new shift patterns which meant that employees had to be trained to use two different types of machine. At the same time they had to acquire skills in measuring and test techniques and learn new work processes.

The learning requirements of this specific target group were given special consideration and as a result a range of didactic methods was employed to disseminate the new technical skills. The main focus was on application-related workplace-based learning. To limit demands on concentration the training units were divided into several small blocks each of limited duration. In addition individual groups were constituted so that each member of a specific group had a similar technical and linguistic knowledge or had a similar level of experience of the job. Participants were also provided with a training manual. This special implement consisted of a written description of the various skills accompanied by visual aids in the form of colour photographs and graphics. It was developed specifically to reflect the particular language difficulties experienced by the older foreign workers.

As a result of this training programme the company achieved a successful introduction of multiple-machine operation. Some 70-80 per cent of the workers acquired the target skills specified in the training plan and the remainder were transferred to other jobs within the company. The company was able to remedy initial problems of motivation, which were the result of insufficient information from the company on the introduction of the new shift system. The training was subsequently extended to other areas of the company.



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## **72. Mannesmann Demag - Integration of older employees in learning groups for the purpose of participation training (Germany)**

This company is involved in mechanical engineering and plant construction. Because of the need for maximum flexibility in the production process and the demands of the market, the company was required to provide extensive training to enhance the problem-solving skills of employees. The largest group of those receiving training in the first phase were aged between 50 and 55. In the course of basic and more advanced seminars the company sought primarily to impart methodology and communication skills.

Mannesmann Demag AG, a part of the Mannesmann Group with its Head Office in Duisburg, is a large company involved in mechanical engineering and plant construction. It currently has 11,000 employees located at 11 sites in Germany. The workforce at Duisburg is characterized by a high percentage of employees aged 50 and above. This is mainly because employees have been with the company for many years.

Because of the need for maximum flexibility in the production process and the constantly increasing demands of customers in terms of quality and price the company was required to provide extensive training to enhance the problem-solving skills of employees in relation to improvements in working arrangements (cf. Hayn and Sell 1993). In cooperation with the educational centre of RWTH [Technical University of Rhineland-Westphalia] in Aachen the company developed a concept for participation training.

In the first phase of the concept training was provided for 75 employees from the non-ferrous metal extraction unit of the metallurgy division. Eighteen of the participants were aged between 50 and 55 and represented the largest group. In the course of basic and more advanced seminars the company sought primarily to impart methodology and communication skills eg the ability to work systematically and in a planned way and the ability to organize processes on the basis of cooperation. Participants were also divided into smaller problem-solving groups, which were given increasing independence and which allowed them to apply these skills direct to improve certain operational activities eg quality assurance.

The training was not expressly targeted at older workers. However according to the company the emphasis on participation, which was an inherent part of the training concept, meant that it was able to achieve comparatively good results despite differing skill levels and learning prerequisites. The experience gained from these schemes so far has shown that older workers experience no greater difficulties than younger workers and in fact it was the latter who tended to profit from the greater experience of the older employees. The commitment displayed by the older participants was considered to be above average both in terms of the degree of cooperation and the quality of their contributions. When it evaluated the results of the training programme the company found that older workers had been as successful in learning new skills as younger employees.

The need to include older employees did not cause problems during the training itself. The problems which did occur arose because participants acquired decision-making and innovation skills during the training. As a result they increasingly questioned the old hierarchies and decision-making structures and in some cases these had to be modified. However this was ultimately considered as a beneficial effect of participation training.

### 2.3 73. Sandvik Belzer - Creation of working conditions which promote the learning process in older workers in a medium-sized company (Germany)

This metal processing company and manufacturer of hand tools for industry and trade has been involved in the introduction of independent production teams, decentralised procurement and introduced production scheduling and planning. Training programmes designed to familiarise the workforce have been designed. Project groups were formed to consider problems in specific areas or relating to specific subjects. In a group context the older employees have been able to contribute their sound operational experience and expand it in a practical environment.

Sandvik Belzer is a metal processing company and manufactures hand tools for industry and trade. It employs about 200 skilled workers at two production sites in Wuppertal and Hasborn.

At the beginning of the 1990s the company was faced with high costs coupled with productivity problems and high stock levels. In response it embarked upon a fundamental restructuring of its work organization. It knew from past experience that investment in new technology was not the sole answer and as a result it introduced independent production teams, decentralized procurement and introduced production scheduling and planning (cf. hereto and in subsequent sections Orbanke and Alt 1995). This meant that both technical and non-technical training was required for all employees. In addition the development of a training concept was included in the strategic objectives of the company.

The subsequent training programmes did not specifically target older workers. However according to the company the training process was structured in a way which largely guaranteed their participation. First of all project groups were formed to consider problems in specific areas or relating to specific subjects eg 'task integration', 'noise abatement' and 'quality improvements'. In a group context the older employees were able to contribute their sound operational experience and expand it in a practical environment. As a result it was possible for example to improve quality in the forge by introducing a system of operator self-control. Secondly the new production groups created an environment which encouraged the learning process as they allowed a gradual extension of job content. In addition short theory seminars were given to acquaint workers with the necessary operational and commercial background.

An evaluation of the results so far show that older workers benefited from this approach and did well. The company expressed the view that their ability to adapt and learn was more dependent on the nature of their previous work and less on education and age. In addition it viewed the



personal development of older workers as positive, as the value of their specific strengths had been increased by integrating their previous empirical knowledge.

Project groups, which are particularly suitable for the training of older workers, are not seen by the company as a 'one-off'. It sees them as an integral part of its continuing organizational and staff development strategy. In this connection it intends to intensify employee training and in future 5 per cent of the annual working hours will be allocated to it.

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#### **74. Stahlwerke Bremen - Continuous self- training in learning groups with particular consideration to older workers (Germany)**

**2.1, 2.3,  
7.1**

Despite the difficult employment situation in Germany a significant reduction in the medium term in the number of skilled workers has encouraged this organisation to introduce age-aware personnel policies. The company has developed the following specific initiatives: non age-specific training for instructors; training for older production workers in the hot-rolling plant; and the development of a concept for the reintegration of mostly older workers who are currently on rehabilitation programmes. These training schemes use open-learning, and workplace-based processes.

The Stahlwerke Bremen is a large company in the steel industry with a current workforce of approx. 4,600. The majority shareholder is SIDSTAHL GmbH, a subsidiary of the ARBED steel group. The workforce is relatively young, only 400 employees are 50 or older and the average length of service is 10 years. About 35 per cent of the workforce are skilled workers and its percentage of foreign workers at 18 per cent is above average compared with other industrial sectors.

Despite the difficult employment situation and the job losses in the steel industry, from which Stahlwerke Bremen has not been exempt, the company views the skills potential of older workers as increasingly important. In response it has developed and implemented training concepts for an ageing workforce. This can be partly explained by the fact that the number of young skilled workers will drop considerably in the medium term. Against this backdrop the company has implemented the following projects:

1. A pilot scheme providing non-age-specific training of instructors in industrial and technical fields.

A total of 31 industrial and technical instructors took part in the first programme, 22 of whom were 40 or older; the oldest was aged 55 and the youngest 25. Although participants were not divided into specific age groups, the age structure meant that there was inevitably an emphasis on the training of older instructors and practical steps were taken during the pilot scheme to encourage their integration.

The aim of the pilot scheme was to acquaint instructors with certain aspects of educational theory and methodology. The programme consisted of regular weekly team conferences backed up by multiplier seminars and in-depth team seminars on an annual basis. The open

learning format of the training and its provision close to the workplace meant it was particularly suitable for older colleagues. The use of an open learning process in the everyday working environment was found to be the most appropriate way to activate, supplement and reinforce the existing experience of older colleagues.

2. Training for workers in hot-roll production with particular consideration to older employees working in production processes.

In addition to the above pilot scheme the Stahlwerke Bremen is planning two other age-related training and reintegration initiatives. It is planning to teach control techniques to about 75 employees in its hot-rolling plant, most of whom are older semi-skilled workers. The training concept was developed by a 65-year old former company employee in cooperation with a younger member still working for the company. Even before the actual start of the project the response of the target group to this initiative has been particularly encouraging.

3. Finally it has developed a scheme in conjunction with the company health insurance fund and the Land of Bremen, which will seek to reintegrate workers currently on rehabilitation programmes. The scheme, which is targeted primarily at the older members in this group, will introduce a system of job allocation, trial working and training, which will be an integral part of the production process. The system will be geared to the specific needs of older employees who have experienced a change in their capabilities or are suffering from a disability and is intended to facilitate their permanent reintegration into the workplace.

## 75. Halkor AE (Greece)

While this organisation has no specific policies for older workers in terms of recruitment they have taken on people aged in their early 50s who were very skilled since they could be productive immediately. They would take on someone of 55 and over only in very specialist jobs or under very special circumstances. There are no age limits on the provision of training. In addition, there are no difficulties in those aged in their 40s and 50s getting promoted. Even with the introduction of the new technology management found that most older workers learned reasonably quickly.

This is a company which is part of a larger multisectorial group of companies and is concerned with metal working and specifically the manufacture of copper and copper alloy, including tubes and pipes. In 1993 it was 145th amongst the 200 largest and most profitable Greek companies with profits of 645 million drachmas. In terms of turnover it is amongst the 20 largest. Its main manufacturing centre is outside Athens in Inofita while it has its main offices in the Athens region.

It was founded over 50 years ago and is currently on its third generation of family owners. It employs 310 people of which the overwhelming majority (98 per cent) are men. Approximately 20 per cent of the workers are over 50 years of age. They do not have anyone on part time work

or seasonal work because of the industrial and shift nature of the work involving continuous production, and using almost entirely skilled men. The company has a turnover of personnel and thus is concerned with hiring however they also have a lot of people who have been with the company for many years and they are sensitive to their needs and loyalty. Approximately 15-20 employees are of Greek origin from the Pontus region of the ex-Soviet Union. Between 65-75 per cent of their products go for export and they are one of the most modern manufacturing units in this sector in Europe. They have been growing in size over the past years though they have not needed to expand their labour force to any great extent given that new technology in this heavy industry has enabled greater productivity and reduced the physical content of the work. This is one factor which has affected older workers positively since they basically use or supervise machines and do not have to have any great physical strength.

The majority of employees remain until they are 58-61 years of age, since this is a heavy industry, and generally no-one stays over that age unless they are in senior management positions. While the company has no specific policies for older workers in terms of recruitment they have taken on people of 50-52 who were very skilled since they could be productive immediately. They would take on someone of 55 and over only in very specialist jobs or under very special circumstances, such as the need of an unemployed individual to complete pension contributions. Given the current situation in the labour market they do not need to advertise to recruit, since people constantly come to them looking for work and many are recommended by others in the factory. Only for specialist graduates would they advertise.

In the recent past the company has done a lot of training, mainly through in-company training programmes financed with support from the E.U. There have been no limits on the age of those trained and training has been undertaken in Quality control, computerisation and management for foremen and mechanics. The effectiveness of the training provided varied but this had no relationship to the age of the participants. Overall the results of training were positive as is evident in that three years ago they applied and received ISO 9,002. Training is both of the general kind or related to new installations. In such cases the suppliers usually provide some training and subsequently the head of the work group undertakes becoming the teacher for other workers. This has no relation to age but depends on someone being bright and able. There are no difficulties in those in their 40s and 50s getting promoted. Even with the introduction of the new technology they found that most older workers learned reasonably quickly since it involved panel/button controls.

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## **76. Manufacturer of Household Care Goods (Greece)**

This organisation has a recruitment policy which does not refer to age. If an older person with the requisite competencies applies then they would be recruited. In cases where an older employee is finding it difficult to cope with their job they may be moved to an easier or lighter job without loss of pay.

Colgate-Palmolive is a manufacturing company for household care products located in Attica. The company is owned by its USA parent company and was established in Greece in 1962. In both 1992 and 1993 it ranked 23rd in terms of its profitability in relation to the top 200 Greek companies, with profits in 1993 of 2,873 million drachmas and sales of 17,357 million drachmas. It employs 340 workers of whom 80 per cent are men. The low percentage of women is accounted for by the fact that they are not allowed to work on the night shifts. In the offices where most women work there is an equal opportunities policy. Employees are Greeks and they do not use part time workers. Approximately 14 per cent of employees are over 50 years of age. The company has a recruitment policy which does not refer to age. If an older person with the requisite competencies applies then the company would take them on. However, in reality, few older people apply because they don't have the skills. In this sense the company has a positive policy that rarely gets implemented.

Most employees stay on in employment and leave only when they get their pension. Usually they want to go at this age because the job is stressful. In cases where an older employee finds difficulties in dealing with this stress the company does try to move them to easier or lighter jobs without loss of pay.

The company has an extensive training programme for its employees. Mostly it does not take on trainers from outside. They believe it is difficult to generalise about older workers in this since the success of training depends on the particular sample of individuals taking it at any one time. The company has found that those within 3 years of retirement are not keen to sit at a desk, however they do continue with on the job training. Older workers have the advantage of being committed, mature and experienced with a lot of practice behind them but they can sometimes find difficulty in changing.

## **7.1 77. Film Sales and Film Processing (Greece)**

This organisation has an equal opportunities policy on age which originates from its parent company in the USA. This involves encouraging people to stay on to complete their service up to pension age. If they were required to reduce the size of their workforce they would consider voluntary early retirement but there would not be any pressure on those who remained active employees. The company undertakes training for all its personnel including those aged in their 60s. The organisation is considering offering part-time jobs and bringing retired workers back on temporary contracts.

Eastman Kodak of Rochester USA established their Greek subsidiary company Kodak in 1961. It employs 176 people, 60 per cent men, 40 per cent women, most of them in Athens with a small department in Thessaloniki. Approximately 35 per cent of its employees are over 45 years of age. It has a very clear equal opportunities policy on sex and age which originates from its USA parent company and which is implemented world wide. This involves encouraging people to stay on to complete their service up to pension age. which is 65 for men and 60 for women. If they were

required to reduce their labour force they would consider voluntary early retirement but there would not be any pressure on those who remained active employees.

Clearly the company values older workers and has many who have completed between 25-40 years of service; this has been recognised by the company in rewards to the staff such as medals for 25 and 40 years of service. This was a policy that clearly encouraged staff to stay on.

The company undertakes training for all its personnel and this includes those aged 62, 63 years as long as they remain active. Training is conducted both internally by the company and externally by people being sent to seminars in training centres in Greece and in Europe. The President of the parent company of Kodak is enforcing a policy making it mandatory for *all* staff to have 40 hours of training per year.

Currently they do not employ part time workers or pensioners since in both cases there are social insurance disincentives to their employment but the company is currently considering this for the future.

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### 78. Hellas Can (Greece)

Older workers participate in all the training programmes offered by this organisation including training in the use of information technology. Older workers' experience is valued by management. Thus older workers are frequently involved in providing on-the-job training. In addition, workers with particular skills may remain with the organisation past the normal age of retirement.

Hellas Can is a can manufacturing company - aluminium cans for drinks and tin plate for food. It has been in existence in Greece since 1965 and is a subsidiary company of Caraud Metalbox, a French-English owned company. In 1993 it ranked 16th in terms of profitability with 3,811 million drachmas profit and sales of 21,967 million drachmas. It employs 396 people in Athens, Thessaloniki and Corinth. In the summer it employs a further 50 people in Thessaloniki and usually over the last 15 years these are the same people. Approximately 1.2 men are employed to every woman. Women are mainly employed in the company's offices.

While there is no written, formal policy by the company in Greece, for years they have had a policy which invests in training and education for their personnel. Thus it is very logical that they want to keep their workers. Until recently the company was highly profitable and thus it wasn't necessary to reduce the personnel. However the mother company forced it over the past two years to reduce its personnel since they are in difficulties. At this point the Greek subsidiary gave all employees who wanted to leave the chance of doing so voluntarily with special incentives. Special emphasis was given to those who were very 'employable', i.e. those who could find work easily, who were normally younger employees; mothers and women who wanted to stay at home or to work with their husbands and older workers who could get early retirement with the company paying all their remaining insurance contributions for IKA and doubling their redundancy

payment. However this is contrary to their normal company practice which rewards those who remain with them.

The Greek company is currently having some difficulties with their parent company since the latter are concerned with new ways of organising production with work being done in groups now. Thus they have to consider how to re-focus their minds on how to produce goods more efficiently. However here in the Greek company where the average age is 44 years they have some difficulties since these older workers have worked hard to produce a highly profitable company and they can't easily perceive the reasons for having to change the methods of production.

Each year the company trains approximately 50 per cent of its personnel, particularly technical training since the company is based on high technology know-how. Most is done internally by the technical department or by the companies who provide the raw materials or are major suppliers. In such training all participate and this includes the older workers. Of course they also use the older workers as trainers since most of the training is technical and on the job where they show what needs to be learned. Special training is provided for those in the offices and older workers participate in this e.g. electronic data processing, word processing or the use of the main frame computer.

Generally in the company and in Greece more generally they felt that experience was very valued, especially for managers. There is a relative shortage of good managers and they believe that 45 is a good age to be a manager. In the company the average age of the managers is 56 years and they have quite a number on the shop floor who are in their 60s. The oldest employee (Director of Sales) just took his pension at the age of 76 years because he didn't want to leave earlier and he was very experienced. His age didn't show at all. He is remaining on as a consultant.

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## **79. ADA (Italy)**

This organisation came into being as a result of a management buy-out by three ex-directors who, when the company was faced with a serious manufacturing crisis, managed to save 100 jobs for employees aged over 40. The organisation has moved out of the armaments industry into, initially, supplying technologically sophisticated attractions for theme parks. This was made possible by a European Union training course which provided training to help employees in the armaments industry to change over to the manufacture of products for peaceful purposes.

ADA (Advanced Development Attraction) is a company that was set up in March 1994 following the dismantling of the Alenia plant (a company leader in the armaments industry) based in Aquila. It was formed as a result of a management buy-out by three ex-directors who, when the company was faced with a serious manufacturing crisis, managed to save 100 jobs for employees aged over

At the start of the 1990s, as was the case with all European armaments industries, Alenia's orders fell sharply. The Aquila plant which produced, among other things, the famous 'Milan' ground-to-ground missiles, had to be dismantled along with its advanced technology and know-how (precision engineering, advanced software, sophisticated robotics). Because of its high output potential, the administrators attempted to save the plant and started by contacting various companies including Ultrapolis. This company is planning to construct one of the largest theme-parks in the world on the outskirts of Singapore and is seeking companies with the technological capability to produce sophisticated attractions and virtual reality games based on advanced robotics. In a short space of time contacts between the two companies had reached the point where the director of the Aquila plant and another two plant managers decided in early 1994 to create, by investing all their own savings (including their severance pay from Alenia), a new company (ADA) and to rent on a ten-year lease the entire plant of the ex-missile producing factory.

At this point long and delicate negotiations began involving various people, in particular the three ex-directors of the plant (now acting as entrepreneurs), trade unions and the government. The aim was to maximize the opportunities offered by national and Community legislation to re-employ more than half (about 100 people) of the factory's employees made redundant following the collapse of the missile supply contracts. Meanwhile, ADA has signed a contract for approximately 100 billion Lire to supply 9 Kimerix (the mega attraction in theme-parks in Singapore), which will probably be followed by the production of a further 16.

The crux of the project, however, lies in the fact that the 100 employees involved, on average aged over 40, were able to make the change from the business of war to that of peace. This was made possible by a European Union training course which started on 20 February 1995. It is due to run to the end of the year after which the manufacturing phase will start. This type of 'Conver' course provides training to allow employees in the armaments industry to change over to the manufacture of products for peaceful purposes.

This is a good example of creativity, boldness and confidence in the future shown by three former employees who demonstrated their belief in the productive capacities of the plant not only in terms of its sophisticated technological equipment, but also in the workforce as a whole which possesses, precisely because of its age, a level of specific know-how difficult to find elsewhere.

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### 80. Olivetti (Italy)

In the early 1990s company found itself with a surplus of some 300 employees - mainly middle and senior ranking employees (excluding managers). Instead of instigating a programme of redundancies the company was persuaded by the trade unions to: offer these employees a reduced salary accompanied by a period of compulsory retraining; eventual employment different from the work previously carried out, but taking into account the professional skills identified during the period of retraining; keeping a job in the Olivetti group.

Olivetti is a company leader in the production of machine equipment, office equipment, computers and information systems. Between the end of 1993 and early 1994, the company found itself with a surplus of some 300 employees - mainly middle and senior ranking employees (excluding managers) in various sections of the company (such as marketing and sales, project engineering, administration, secretarial and other services, systems) and all relatively old (about 90 per cent aged over 30 and almost 40 per cent over 45). Despite the company's initial intention to use the social benefits provided for under existing national legislation to guarantee employees a substantial percentage of their final salary without imposing any particular obligations, the trade unions preferred to reach an agreement (Olivetti Agreement - OO.SS. of 17 January 1994) on the basis of:

- a reduced salary accompanied by a period of compulsory retraining;
- eventual employment different from the work previously carried out, but taking into account the professional skills identified during the period of retraining;
- keeping a job in the Olivetti group.

In general, the results of the initiative were as follows:

- enhanced professional resources through the development of new and more appropriate cognitive strategies, skills and knowledge;
- rationalizing the process of detachment from the previous job by transferring the values, skills and attitudes associated with a particular job to the broader concept of 'employment';
- a stronger contractual position for those affected because individual cases were lumped together as a general problem worthy of particular 'social' attention, based on the trade union agreement mediated by the Ministry of Employment and the creation of a joint management-trade union committee responsible for scrutinizing the implementation of the company's retraining and outplacement plan.

In real terms, of the 300 employees involved in the retraining initiative, only 48 left the courses before completing them ( of these 31 re-entered the company and 17 left), while practically all the others changed their job function (only 5 per cent continued with the same job in the company, although it may have been altered radically).

The Olivetti case presented here may be considered as a halfway house between a traditional training programme, bound by a contractual agreement, and an outplacement programme. The most interesting aspect of the initiative concerns the willingness and ability of trade unions and employees to transform a sensitive transitional period of unemployment (with the real possibility of redundancies) into a situation where they could maximize their professional skills, even though this entailed undoubted economic and cultural disadvantages. The initiative is of further interest as a clear example of the EU programme for the professional retraining and adjustment of the workforce to technological changes (in particular the ADAPT programme 1994-1999).



## 81. Ansaldo Gie (Italy)

2.1

In 1990 this organisation operating in the energy sector had problems with overstaffing and obsolete jobs. The company introduced a programme of direct training for surplus staff who were to be made redundant by the company, and for staff within the company who were to be transferred to new tasks. The training course included specialist support and technical back-up for employees with skills not completely obsolete, complete retraining for those whose professional skills were obsolete and developing resources through promotion based on the acquisition of educational qualifications. The results of the training programmes were that the majority of staff were reintegrated in the company.

Ansaldo Gie is a company leader in the energy sector especially in the construction of components for hydroelectric, thermoelectric and nuclear power-stations. The company, which heads Finmeccanica in the IRI group, has its headquarters in the city of Genoa (Liguria) with local branches in Legnano, Sesto S. Giovanni (Milan area) and Gioia del Colle (Bari area). It currently employs about 7,000 people, the majority of whom are relatively old (average age between 40 and 50), because of the extremely low turnover within the company.

In early 1990, the company became interested in various methods of restructuring mainly because of:

- a. the need to downsize the two units in Legnano and Sesto S. Giovanni as a result of changes in the national regulations concerning nuclear energy;
- b. the intention to gear production costs more closely to market prices, while simultaneously extending the product range.

These strategies affected the workforce in two ways: first, they led to overmanning (more than 250 people were placed on the IEF), second, they gradually made the jobs of a large number of employees obsolete (around 700 employees). Both these factors were addressed by means of a strategic plan, jointly agreed with trade union representatives, based primarily on direct training for surplus staff who were to be sacked by the company, and for staff within the company who were to be transferred to new tasks. The training course was structured on four levels as follows:

1. specialist support and technical back-up (or better know-how) for employees with skills not completely obsolete;
2. integration at managerial level for line managers to enable them to learn new managerial functions;
3. complete retraining for those whose professional skills were obsolete;
4. developing resources through promotion based on the acquisition of educational qualifications (institutionally recognized qualifications).

The results of the training programmes were as follows:

- a. all staff whose professional skills were totally or partially obsolete changed their jobs and were re- employed in the company in new professional positions (57 per cent) or in their previous positions, but using more advanced technological equipment (43 per cent);
- b. 74 per cent of employees on the IEF were reintegrated into the company in new professional positions (40 per cent), or in their previous positions, but using more advanced technological equipment (60 per cent);
- c. a further 6 per cent of employees on the IEF managed to find jobs in other companies despite the depth of the crisis and the restriction on employment in the area where the initiative took place (Lombardy).

## 2.1 82. Higher Training Institute (Italy)

This organisation is operating a training programme for unemployed people, the majority of whom are older people. The programme has several innovative aspects: i) the target group, given that a training programme has never been implemented before on such a huge scale for older workers in southern Italy, a depressed area with a lack of job opportunities, where training measures for older people have always met with major difficulties; ii) the strong commitment to stimulate the region by setting up organizational teams which involve all the institutions; and iii) that it is an initiative promoted by one of the largest trade unions.

The Higher Training Institute (ISF) is a non-profit-making organization which aims to promote research, project work, experimentation and assessment in the field of training with particular reference to trade unions and professions. The institute was set up in the early 1990s at the initiative of one of the most important national trade union confederations, the CGIL.

In terms of the importance and originality of the Institute's work, it is worth mentioning the 'training plan for workers on mobility allowances and the integrated earnings fund in the southern regions' developed under ESF Programme No. 93601/1.

This initiative was aimed at 635 unemployed people in seven regions in the south (Abruzzo, Molise, Basilicata, Calabria, Puglia, Sardinia and Sicily). While it was not directed exclusively at older employees, the majority of people involved in the training programme fall into this category: out of 635 participants, over 80 per cent (513) were aged over 30 and almost 40 per cent (243) were aged over 45. There was a clear majority of men (about 70 per cent) whose professional qualifications and educational levels were particularly low (almost 80 per cent general labourers with lower secondary education). The training programme began at the start of the year and is still in progress.

Despite the measure's apparent lack of originality, being simply a training measure financed by European Union funds, from a national perspective it has several interesting and innovative aspects as follows:



- a. the target group, given that a training programme has never been implemented before on such a huge scale for older workers in southern Italy, a traditionally depressed area with a serious lack of employment opportunities where training measures for older people have always met with major difficulties; one of the project's priority aims is the construction of effective operational models for training and reskilling older workers made redundant prematurely in areas with few employment opportunities such as the Mezzogiorno;
- b. the strong commitment to stimulate the region in question by setting up organizational teams at regional level with a view to involving all the institutions (trade unions, companies, public and regional) to guarantee the workers involved the necessary technical and training support in the post-training phase;
- c. the fact that it is an initiative promoted by one of the largest trade unions which is a possible indication that trade unions may be taking greater interest in the older workforce.

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## CREATION OF LEARNING ENVIRONMENT

2.3

### 83. Adam Opel AG - Training of older workers through group working and the use of appropriate technology (Germany)

2.2, 4.2, 4.3

This motor vehicle manufacturer has recently introduced group working. As a result, workers have become more involved in tasks such as preparation, planning and administration. The company considers that older workers are able to make greater use of their previous experience when completing these particular tasks and so are able to compensate for any shortcomings which they may have in other areas. Learning takes place in the company of other colleagues which makes the process of acquiring new knowledge and skills appear more natural to older workers.

Adam Opel AG - a subsidiary of the American company General Motors - is one of the largest vehicle manufacturers in Germany with a workforce of some 51,000. Since the mid-1980s the company has been introducing new forms of working which are better able to cope with the changes in economic and manpower requirements. Group working was introduced at its main production locations of Rüsselsheim and Bochum in 1991 and the company sees this as particularly encouraging to the employment situation of older workers in the company both from the skills and health standpoint.

With regard to training measures in the narrow sense the company drew attention to two elements which should improve the integration of older workers. Firstly highly complicated machine tools and handling equipment are increasingly designed so that the learning processes - eg help functions indicating the necessary programming steps - can be located on the machine itself. The input of operating commands is more or less similar to the set-up procedure which workers followed for the operation of conventional machines. This means that older and of course younger workers are spared abstract and, therefore, difficult learning situations. Secondly the company drew attention to the advantage of learning new working techniques in the company of other

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colleagues which makes the process of acquiring new knowledge and skills appear more natural to older workers. In addition it can considerably reduce the inhibitions which are otherwise felt if attendance at a formal training session is required. The mutual understanding and trust which is necessary between younger and older employees is encouraged through weekly one- hour team meetings.

In addition group working facilitates the inclusion of a range of tasks which were not previously a part of their job. This applies particularly to preparatory, planning and administrative tasks. The company considers that older workers are able to make greater use of their previous experience when completing these particular tasks and so are able to compensate for any shortcomings which they may have in other areas. This applies in particular to the role of the group spokesperson who represents the interest of the group.

Overall the company has found that these changes in the method of working, the effect of group working and the supporting technical measures have enabled it to maintain or even increase its productivity levels despite an ageing workforce. Admittedly there is currently no concrete economic data available to substantiate this assertion. Similarly there has not yet been a comprehensive evaluation of any negative effects on older workers as a result of group working eg because of an increase in the pace of work. In addition it should be borne in mind that reduced sales in recent years have resulted in a reduction in staff levels of some 3,500 and this has primarily been achieved by early retirement and the payment of compensation for job loss, both of which have affected older workers in the main.

## **2.1, 4.1, 4.3 84. Continental AG - Workplace design for all age groups and health protection training (Germany)**

This tyre manufacturer has introduced a wide range of policies which benefit older workers. The main organisational change was the introduction of group working which was designed to ensure that older employees were better able to cope with elements of their job which were age-critical. In addition, the introduction of additional work-related tasks was intended to prevent the concentration of stresses and strains in a single area. A decision to form groups of mixed ages and with mixed performance ability was also intended to counteract stress.

Continental AG, with its Head Office in Hanover, is one of Germany's leading manufacturers of tyres with a current workforce of about 20,000. The company completed its project 'Workplace design in the tyre industry suitable for all ages' some time ago (cf. Hainke 1994). However its innovative approach and the information which it has provided on long-term effects after completion of the project (cf. Sommer 1993) justify its inclusion. The background to the project was the fact that a sizeable percentage of a specific group of production workers had to give up working on reaching 40 or had to be transferred to other jobs. In the course of the project a comprehensive range of organizational, technical and personnel measures were developed which were designed to improve the working conditions of older workers and ensure their continued working in the company. The approach was not targeted solely at a specific age group but the



company sought to deal with the working conditions of all workers irrespective of their age. The summary below deals primarily with the measures affecting methods of working and training.

The main organizational change was the introduction of group working. The associated reduction in division of labour was intended to ensure that older employees were better able to cope with elements of their job which were age-critical. In addition the introduction of additional work-related tasks was designed to prevent the concentration of stresses and strains in a single area. The conscious decision to form groups of mixed ages and with mixed performance ability was also intended to counteract stress.

The training initiatives played more of a complementary role in the whole project and were designed to enable workers to learn movements which would reduce the level of physical effort. The programme consisted of an initial analysis of the way individuals currently worked. This was followed by comprehensive training during which workers were shown methods of working which would be more appropriate to the human physiology and thus achieve a significant reduction in stress levels. At the outset it did prove difficult to correct existing methods of working. However in the end the training was so effective that with the help of regular monitoring and follow-up initiatives it has been possible to achieve further stability.

In its evaluation of the project the company drew attention to both the positive and negative effects. It was considered a success that the percentage of tyre winders aged over 45 years increased from 6.2 per cent to 27.6 per cent during the course of the project and this trend has been maintained since the project's completion. The project provided the tyre winders with a better understanding of ergonomics and methods of working and the associated training in new methods has allowed them to maintain the improvements. In general the level of physical stress has been reduced. However after completion of the project changes were made to the general working environment - in particular a new generation of machines and new hours of work were introduced - which resulted in an increase in the pace of work and which in turn resulted in a deterioration in the working conditions of older workers.

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### **85. Felten & Guilleaume Energietechnik AG - Job-based training for older employees in 'Learning Shops' (Germany)**

**2.2**

This electrical engineering company has introduced a training programme which was seen by management as helpful in encouraging the integration of older unskilled and semi-skilled workers. In addition to the active process of imparting knowledge, the training also gave the participants freedom to structure their own learning programme. It also incorporated technical innovations and provided a mixture of theory and practice. The dissemination of specialist information through structured courses was supplemented by so-called 'Learning Shops', which were an integral part of the company structure.

**111**

Felten & Guillaume Energietechnik AG, with its registered office in Nordenham, is an electrical engineering company and has a current workforce of about 5,500, the majority of whom are unskilled or semi-skilled.

During the 1980s the company experienced a sharp drop in turnover and it had problems with organizational structures within the company. As a result semi-autonomous production islands were introduced into the production process. This created an integrated job content for the relevant employees which, combined with a simultaneous increase in the freedom of action, placed greater demands on organizational and planning skills of workers. As a result the company decided that a comprehensive training strategy was required.

The training concept developed by Felten & Guillaume was seen as particularly appropriate in terms of encouraging the integration of older unskilled and semi-skilled workers in a comprehensive training programme with a demanding subject matter content. In addition to the active process of imparting knowledge the training also allowed the participants a certain freedom to structure their own learning programme. It also incorporated technical innovations and provided a mixture of theory and practice. In addition the company ran targeted introductory courses which were designed to awaken what was frequently a latent willingness to learn. In particular the pure dissemination of specialist information through structured courses was supplemented by so-called 'Learning Shops', which were an integral part of the company structure. They were seen as particularly suitable for the learning needs of older workers as they combined to best advantage experience and teaching methods with a practical basis. In this way it was possible to eliminate the initial reservations expressed by older workers with regard to the value of the training in general and their fear of failure.

In contrast the absence at times of a clear link between the training and the use in practice of the acquired skills had a negative effect on the motivation of participants and in some cases skills remained unused or were forgotten. The willingness of the staff to undergo training was also threatened by the fact that the negotiations on a wage increase as recognition of their increased skills were not started until part way through the programme. Finally the failure of the company to provide the required support for the Learning Shop concept can also be criticized and as a result this concept was not continued on a permanent basis.

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## **86. Vereinigte Becker'sche Werkzeugfabriken - Practical training and multiplier training for older employees (Germany)**

This company produces high-quality hand tools for professional use. Recently workers aged 50 or older were trained to work on computer-aided machine systems. One-week external sessions were followed by a one-week practical sessions in the company. The training activities were supplemented by requiring workers to perform any job which arose. This gave them experience of working on a range of problems. Also, they were provided with software which had interactive graphic interfaces and displayed a real representation of production processes. This allowed all participants to learn new tasks with minimal support.



Vereinigte Becker'sche Werkzeugfabriken (VBW) based in Remscheid produce high-quality hand tools for professional use. Its current workforce is approximately 280.

The company took part in 'Learning and Production', a research and development programme promoted by the German Ministry for Research and Technology. Apart from its temporary requirement to make use of an external training provision to facilitate the introduction of new working techniques the company also justified its participation on the grounds that its older experienced skilled workers were, in its view, an important factor in the company's own performance and its participation in the above project was intended to enhance the skills of this group of workers.

Several of those participating in the training provided under this project were 50 or older and they were trained to work on computer-aided machine systems. Training was a mix of external and internal sessions. Each one-week external session, which was given by an external training organization, was followed by a one-week practical session in the company itself. The in-house learning process was supported by specially trained multipliers. For the practical phase the company allocated approximately 2-3 hours each day during which time participants were able to practice their new skills. This meant that they were able to set their own pace of learning.

In addition the training effects were supported by an organizational and technical framework. Within their individual working group workers were required to perform any job which arose. This meant that they had to deal with a wide and demanding range of tasks. In addition they were provided with software which had interactive graphic interfaces and displayed a real representation of production processes. This allowed all participants, including older workers, to learn new tasks more or less independently.

According to the company the older participants were quick to learn. This was cited as evidence that the new technical facilities combined with the internal and external training had provided sufficient stimulus to encourage the learning process. Admittedly some of the participants were unable to use all the acquired skills sufficiently, as several of the older workers were subsequently deployed as supervisors rather than as machine operators. In addition the company found that both in this area and in technical aspects it had to make further improvements e.g. by optimizing the 'teaching ability of the machine'.

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### **87. Paper Manufacturer (Greece)**

**4.3, 6.4**

This organisation aims to retain its older workers. Management believe that experience is valuable since this cannot be taught. This organisation is undergoing a period of rapid growth and older staff work as mentors with younger employees and provide on the job training.

This large national paper manufacturing company has its central factory located in one of the Greek regions, with sub departments throughout Greece for the distribution of its various products

that are widely used by consumers. It is a successful, profitable and expanding Greek privately owned company with 530 employees (89 per cent men and 20 per cent women) in the Greek company and amongst the first 200 most profitable Greek companies. It also has subsidiaries in other countries employing a further 1500 people. All workers in the Greek based company are Greek citizens, though a number belong to a religious minority, and all are full time workers. Only rarely have they used part- time workers. Since the company is involved in heavy manufacture women have been limited to assisting roles, but the company is developing a programme of training to turn women into more skilled workers.

The employment policy for older workers changed because of the change in the rules for IKA insurance; where previously women could leave at 50 and men at 55 with a pension, employees now have to go on till 60 or 65 years of age for a full pension or leave with a reduced pension after completing minimum contributions. Gradually people will be taking their retirement at later ages. The company's policy is to try and keep the experienced older workers active in their labour force. Clearly there are significant differences in physical capacities between individuals, thus some older people are physically and mentally young, one example being the ex Prime Minister Mr.Zolotas at 97 still swims regularly and is very active while some young people are physically and mentally old. Clearly the company is not a philanthropic organisation but it does try to have correct and good practices towards its employees. Some people want to leave as soon as possible since they have other activities e.g. farming, that they want to take up. The company wants to keep those whose experience is particularly valuable since they feel that this cannot be taught.

As a rapidly developing company they need to teach young employees coming into the job and for this they need the experience of older people. The company does a lot of training, much of it on the job. They have a Department of Training which periodically brings workers into the classroom. As far as possible they make sure that the training is never far removed from practical needs rather than being theoretical. Many of the older workers are 'masters' in their trade and know better than anyone what they need to learn.

The company renews and extends its staff by recruiting degree holders from universities and Higher Technical Institutes. Clearly local factors bear on company policies. In Greece the low level of pension and the fact that many people, especially men in their 50s still have family obligations e.g. to finance their children's education, means that there is a strong motivation for many to stay in the labour force.

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## 7.1 88. City Bank (Greece)

This American owned subsidiary's equal opportunities policy states specifically that there shall be no discrimination based on sex, race or age and that employment shall be based on ability. Older people are considered by management to be the best trainers because of their experience, and they are particularly used for the local internal training. Older employees tend to remain with the company until they complete their pension contributions.



The City Bank is a highly successful and profitable private, New York stock-based company with subsidiaries world wide. The company began operations in 1964 in Greece and is involved in banking, insurance and related services. It has branches in many parts of Greece with 800 full time employees with almost equal proportions of men and women, mostly graduates or equivalent. Approximately 40 per cent of the employees are over 40 years of age, of which 10 per cent are over 50 years of age. The oldest person in the company is 60 years. The company's employees are overwhelmingly Greek. During the summer period the bank also hires approximately 50 full time and part time, temporary staff for up to 6 months who are usually university students since this is a valuable way in which they gain work experience. There have been varying periods of both expansion and relative contraction during the last 10 years; a few employees in their 40s with banking experience, were recruited between 1987-90. The company stopped recruiting permanent staff after this period since computerisation and technical improvements as well as improvements in the organisation and management of the services offered by the bank has effectively eliminated some work positions and reduced the number of staff needed. The surplus personnel were retrained and re-deployed; no compulsory early retirement scheme was introduced though voluntary early retirement is available.

An equal opportunities policy was introduced from the start of the company in the USA on a world wide basis by the Directors; thus essentially there is no Greek input to this policy. The policy states specifically that there shall be no discrimination based on sex, race or age and that employment shall be based on ability. This is a pro-active policy both in recruitment and internal promotion.

The bank has a well developed human resources management programme and describes itself as 'a Learning Organisation' marked by constant innovation, continuous learning and work in teams. Both for recruitment and internally there are specific job descriptions that allow performance by the individual employee to be measured. Everyone is involved in training courses with an average 60 hours annually for all employees however this varies according to position and career development. Older people are their best trainers because of their experience and they are particularly used for the local internal training. The introduction of new technology meant that the company had to undertake training for all their staff and reorient them. Learning problems are not evident with older people, though there is a tendency for them to be used to a specific way of doing things. With older people they need to be convinced of the value of training. Growing older does not mean that the individual cannot function or learn and for older people it is particularly critical because younger people have come from the universities and with recent, up to date knowledge while older people are far from their university years and they need to keep up.

Payment is not by seniority, there are no age related payments; on the contrary salary levels relate to merit i.e. to job positions and performance levels. Older employees tend to remain with the company until they complete their pension contributions.

### 4.3 89. Shellman Wood Products (Greece)

Normally, in terms of recruitment, this organisation does not discriminate by age. Instead it is more concerned with productivity and knowledge. Older people who are having difficulties with the heavy nature of the work may be moved to a less demanding job. While the organisation has faced the need to downsize recently this has not involved the targeting of older workers. Workers participate in training programmes up to the age of retirement. A particular innovation has been teamworking to ensure the transfer of experience from older to younger workers.

Shellman is a Greek company with one shareholder. It was founded in 1960 and though once owned by a Greek-Swiss is now 100 per cent Greek. It manufactures hardboard products and has its main factory in Evia with offices in Athens. It employs 1,100 people, 75 per cent men and 25 per cent women; all are employed full time. While they have no exact figure on the numbers over 50 years of age they estimate this to be about 20 per cent. They do not employ foreign labour.

The age of the company has played a considerable part in their recruitment since in the last 4 years they have taken on only 30 people, virtually all young people into first entry jobs so that some new blood would come into the company. However normally the company does not separate people by age but is concerned with their productivity and knowledge. Factory production is heavy and difficult work and they are aware of this so that if an employee is 55 years of age and gets tired they move him. In any case the trades unions wouldn't allow dismissal.

In recent years the company has been facing a decline and has been downsizing their employees. However those leaving were of all ages and depending on their job position and production. They measure productivity with the foreman overseeing. Since people work on machines it is easy to monitor differences in productivity. In administrative positions this is more difficult. Over the next two years they hope to have developed more detailed job descriptions. Thus they do keep records on all their personnel and they don't want discrimination based on age. The older workers may be more productive, better and more experienced workers. There was a period in 1977 and 1983 when the local demand for labour was so high that the company couldn't easily find workers and had to recruit whoever they could get including some older people from farms. They found it difficult to adapt to the ways of working of a wage earner and also found it difficult to learn. However these are leaving.

Training is undertaken systematically by the company with 250 being trained annually. Training is done by department and thus covers groups of workers of mixed ages. There is a tendency for the Head of the Department to put the most active into the training course, so the Personnel Department has to ensure that the composition of the training groups is more representative. They have had experiences of departments with a training group that includes those within 4 months of retirement.



One innovation was to ensure the transfer of experience from older to younger workers. The company has set up some team working in the last 2-3 years whose task is to look at productivity and quality. The company terms this the Quality Cycle and it has many elements of Total Quality Management.

With reference to new technology e.g. computerisation and electronic feeding, if someone is in the appropriate job position such as a machine handler, then he or she will be trained whatever their age.

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### **90. Municipal Nursing and Residential Care Service (GDVV): mentor posts (Netherlands)**

**3.2**

This is an umbrella organisation covering thirteen municipal nursing and residential homes. Agreement has been reached with the trade unions that all staff aged 56 and over are eligible for a four-day working week in return for a number of emoluments (for example, a reduction in pay). In addition, a member of staff who is finding it difficult in their present job they may be found another role.

The GDVV is an umbrella organisation covering thirteen municipal nursing and residential homes in The Hague. The service employs 1300 staff. Almost 47 per cent are over the age of 35 and over 16 per cent over 45. This is quite a high percentage for the care sector. It is not surprising that, partly because of this age structure, the necessity of a more age-aware personnel policy should have been realised. In 1993 a working party on policy on older employees was set up by the Municipality of The Hague. This working party tried to form a picture of the jobs in health care where a reduction in working hours would be necessary as staff grew older. However, it proved impossible to form an adequate, realistic picture. In fact agreement has now been reached with the trade unions that all staff aged 56 and over, whatever their job, are eligible for a 4-day working week in return for a number of emoluments (such as reduction in working hours payments or ADV). The working party was dissolved in May 1994.

On its part the GDVV responds *ad hoc* to signals from the field. A good example of this is the following. The chief nursing officer in a department of 30 people indicated during a performance interview that her job was becoming a little too onerous for her. She is over 50 and would prefer to take things a little easier. The organisation took an understanding view, but at the same time wanted to retain her knowledge and experience. Possible options within the organisation were explored, without involving too great a reduction and hence a loss of knowledge and experience. What emerged was that in various departments there was a need for supervision and coaching by someone with expert knowledge in the field. So that there was a vacancy for a mentor. The departmental head was asked to take on this role. She did so and is now acting as a mentor in the GDVV, to the complete satisfaction of the organisation and herself.

## 2.4 CAREER DEVELOPMENT

### 4.1 91. Verkehrs-Aktien-Gesellschaft - Integration of older workers through training to facilitate a job change (Germany)

This organisation runs a public transport system. The company has decided to reduce job stress through job restructuring and making changes to career patterns. One possible development is to allow employees time during working hours to acquire a secondary skill. They would then be qualified for other jobs in the company. The introduction of duty roster groups was seen as a further possibility. Employees would be allocated to a group and each group would then plan and supervise the deployment of drivers on a certain part of the transport network. Participation in these duty roster groups would offer group members a wider range of individual jobs, with different physical and cognitive stresses.

Verkehrs Aktien Gesellschaft (VAG), which is located in Nuremberg, runs the local public transport system in the city area and employs about 1,500 staff. Eighty per cent of the drivers have completed a vocational training scheme but often they are now working in a non-related area.

A feature of the career pattern for drivers is that many are unable to continue working as bus or tram drivers after an average of 20 years because of health problems. These health problems are caused by a wide range of stresses, both physical and those relating to hours of work. As a result drivers are either transferred to less attractive lighter duties or they take early retirement on the grounds of total disability or an occupational incapacity.

Both for commercial reasons and in the interest of employees the company decided, therefore, that it was necessary to reduce these stresses by restructuring jobs and making changes to career patterns. The company felt that one possible development would be to allow employees time during working hours to acquire a secondary skill as an addition to their existing driving skills. They would then be qualified for other jobs in the company and it would bring about a transfer of some of the workers to skilled jobs. For example this principle was applied to workshop jobs ie older drivers were trained to maintain and repair the company's vehicles. In this case it was sometimes possible to make use of existing vocational qualifications, for example, as electricians, painters, etc. However new technical training was also required. To ensure that the older drivers who had received such training had an opportunity to work in the workshops, workshop staff were also transferred to driving duties for a temporary period.

The introduction of duty roster groups was seen as a further possibility. Employees would be allocated to a specific group and each group would then plan and supervise the deployment of drivers on a certain part of the transport network. Participation in these duty roster groups would offer group members a wider range of individual jobs, whereby each job would involve different physical and cognitive stresses. However the scheme requires considerable preliminary planning and the company is faced with major organizational problems in its efforts to implement it.

118 Considerable organizational and research input will be required before it can be introduced.



With regard to the above approaches it should be noted, in particular, that efforts to integrate older workers do not necessarily mean that all workers must remain in the job for which they were originally trained as has been assumed previously. Their integration can also be achieved by extending skills to cover other specific jobs. Admittedly a limiting factor in this respect is that there are only a limited range of skilled jobs and the strategy of job change is not currently seen as a universal panacea. However there are opportunities if the activities of a company can be expanded to include additional services as this will open up new areas of activity - eg servicing and customer advice - and so extend the areas of deployment. A further problem is that drivers may be reluctant to change to other jobs despite the fact that they have been working as drivers for many years. In future attempts will be made, therefore, to start the additional training programme earlier in the career cycle and for job change to be a more planned occurrence.

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## **92. Computer-Service-Dienst - Integration of older employees by expanding into new business areas and training with others of a similar age (Germany)**

**2.1**

This organisation has developed an alternative strategy to enable older employees to remain within the company. It has expanded into a new area of activity and opened a 'Repair Service Centre'. The Centre has provided alternative work for about 30 per cent of its older service engineers. Other older engineers have been trained to work on new computer systems. In addition, approximately 20 per cent of the older service engineers have been transferred to consultancy and customer care functions within the Sales Department.

Computer-Service-Dienst is part of the field services division of a large computer company. Because of adverse changes in the age structure of its workforce this part of the company implemented special staff development and training measures at the beginning of the 1990s which were targeted at older service engineers. Amongst this group the dominant age group was mid-forties to fifties because most of the service engineers had been taken on during the recruitment boom of the mid-1970s and a ban on recruitment had made it more difficult to recruit younger engineers.

In the eyes of their technical managers the majority of them were too old for their job. As reasons for this assumption they cited outdated qualifications, psychophysical fatigue and client expectations that engineers should be young, dynamic specialists. However traditional exit routes could only be applied to some of the older engineers. Many rejected settlement terms or regional transfer.

As a result the company developed an alternative strategy to enable the employees to remain within the company. It expanded into a new area of activity and opened a 'Repair Service Centre'. The Centre provided alternative work for about 30 per cent of the older service engineers. If it had not been opened it would have been impossible to have found jobs for these engineers which were commensurate with their existing skills. It was seen as a forward-looking solution because older engineers were not merely transferred from an external to an internal situation but the existence

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of a group of older otherwise non-employable employees allowed the company to diversify into a new business activity and at the same time provide jobs for these employees. Admittedly no new skills were acquired - the service engineers continued to work with the old computer systems and they lost the contact with the customer.

In contrast some of the older engineers were trained to work on the new computer systems. This was necessary because the company had a ban on recruitment which made it impossible to recruit younger engineers - something which had been openly blamed not least on this group of older engineers and their reluctance to leave the company. Problems were also experienced during the training itself because the existing skills of these older employees had to a large extent been acquired through experience and it was impossible to build on this background to acquire the new skills which were based on systems engineering. On the other hand the company considered that the initial segregation of the older workers contributed to the success of the training programme - initially they remained a separate group and only worked with younger engineers after a certain period. All the older engineers who started the training are now using the new systems. In addition about 20 per cent of the older service engineers were transferred to consultancy and customer care functions within the Sales Department. These positions were seen within the company as a promotion as they were associated with increased salary and prestige. Knowledge of new technology was less critical for these jobs. Of greater importance was an ability to analyse customer problems and marketing skills. Of particular note in this respect was less the promotion in its own right and more the realization that you could still achieve promotion in your mid-forties, an age which was considered relatively high.

#### **4.3 93. Hadewe BV: work situation interviews (Netherlands) (4.3)**

Hadewe is a production company making postal and paper machinery. It is concerned with the welfare of staff and offers development interviews. The main aim is to improve the well-being and motivation of staff among all staff including older people. While the interview model is no different for older or younger staff, younger staff are more concerned with career prospects while older people are more concerned with structuring their final years with the organisation before retirement. This might include a discussion about reducing an older worker's level of responsibility.

Hadewe, a production company making postal and paper machinery, has been part of the French Neopost group since 1 January 1993. Hadewe employs 167 people. The average age of the workforce is rising in this company too. In 1993 almost 41 per cent were over the age of 40. In its view of the state of affairs Hadewe indicates, for example, that:

- staff responsibilities must be set as low as possible in the organisation;
- management staff must try to motivate employees and prevent demoralisation;
- good information must be provided to staff.



In practice this vision is expressed for example in concern for the welfare of staff in the form of work situation interviews. These interviews give management the opportunity of gaining a clearer view of developments in the workforce. The main aim of the work situation interview is to improve the well-being and motivation of staff by dealing carefully with staff and calling on the expertise of staff as far as possible. And that applies not only to younger staff. Regular work situation interviews are also conducted with older staff. The interview model is no different for them than for younger staff. However, depending on the employee's age the emphasis in the interview will be on different topics. If younger staff often want to know 'How far can I go?' during the interview, with older people the question tends to be 'What is the best path to follow for the next few years?' It becomes important how the coming, remaining years are structured. There is some resistance to work situation interviews among older staff. According to the personnel manager this is connected with the fact that these interviews are generally focused on career and professional achievement. However, Hadewe believes in conducting interviews with older staff as well, precisely in order to be able to identify the vulnerable moments in a person's career - for example, to see if adjustment of responsibilities is necessary. This is meaningful information both for management and for the employee.

It has emerged from a survey that the majority of employees regard the interviews in a positive light. The fact that attention is periodically actually paid to the member of staff, is assessed as good. 'You have problems wherever you are, and you can solve them by talking, expressing your feelings' (employee, aged 43). The intangible benefit is consequently clearly apparent. The interview also has an observation function at the individual level and as such can be regarded as an important source of information for formulating a more structural career and training policy, for older people too.

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#### **94. Gastec NV: career review interviews and mobility (Netherlands)**

**5.2, 7.1**

The issue of an ageing workforce has led the personnel department in this company to produce a paper on 'age-aware personnel policy' which sets out the objective of keeping the average age in the company at approximately 39. The company is aiming to produce a more versatile workforce. To facilitate this process and, particularly to mobilise employees who had occupied the same position for an extended period, a combination of performance, assessment and career planning interviews has been devised and linked with opportunities for job rotation. In addition, early retirement will eventually be phased out.

Gastec (Netherlands Centre for Gas Technology), based in Apeldoorn, employs 330 people, of whom approximately half have studied to university or higher vocational level, 40 per cent to secondary professional education and 10 per cent to lower vocational education. This distribution points to a relatively high number of specialists.

Over 36 per cent fall into the 40-49 age-group while some 10 per cent are over 50. Given the age structure, by the year 2000 approximately 57 per cent of the workforce will be older than 40. This increasingly ageing workforce led the personnel department to produce a white paper on 'age-

aware personnel policy', which sets out the objective of keeping the average age in the company at approximately 39 and (in connection with that) increasing mobility. As a guideline for the second objective a rate of some 20 (external or internal) transfers is maintained each year. This emphasis on mobility is directly linked to a turnaround in company culture since the early 1990s. Previously the company was technology-driven, as a result of which all specialists stay together in one department, for example materials technology and process technology. From the beginning of the 1990s onwards a change in the direction of 'market and product orientation' took place, which had a direct effect on the organisation of staff. There was an attempt to widen people's horizons and not create specialists. In order to achieve this people were grouped around markets and products and the specialists were distributed among the departments. Everyone was given a different job in a different place which as far as possible was consistent with their old jobs.

To accompany this process and particularly to mobilise employees who had occupied the same position for an extended period a combination of performance, assessment and career planning interviews was devised linked in with opportunities for job rotation. As has been said the personnel policy does not explicitly target older employees, but all employees who have been in the same job for a considerable period. Nevertheless, in practice it mainly affects older staff (over 40).

\* Performance interviews

Performance interviews have been conducted since 1990, with no one excluded on age grounds. These interviews focus on aspects of behaviour of management and staff and have a coaching function. Performance interviews are conducted annually with everyone, whatever the circumstances. The content of these interviews is not recorded centrally. Employees are, however, asked to draw up a report of the interview which is kept in their file in the department. There is a central record of whether an interview has been conducted and if so when. The personnel department often indicates agenda points for such an interview and carries out a random sample evaluation among management and staff, on the basis of which it reports to the works council and the management team. The performance interviews are generally seen as positive. It is noticeable, however, that less highly skilled employees take relatively little initiative and contribute less to the interview themselves.

\* Career review interviews

In order to increase mobility the first step was a so-called register of interests. Employees could enter on a form what jobs or areas of responsibility they were basically interested in. If internal vacancies arose this register of interests was first consulted in order to find a suitable candidate. In practice this register did not work efficiently. The forms were completed in widely differing ways: 'People who wanted to tackle everything in the organisation as opposed to people who wanted nothing; people who answered everything without interest (vaguely and defensively) as opposed to people who filled in everything very precisely'. Partly as a result of these experiences and at the request of those involved the area was more intensively explored in individual career

review interviews. These are carried out by Personnel at the request of direct line managers or employees themselves.

The central personnel section also devotes attention to employees' careers. The focus is on people who have been in the same job for a considerable period (ten years or more). The company believes that there is a risk that this category will be left behind in the cultural change it feels is required. That is usually expressed in the form of dysfunction and frequent absenteeism. Internal surveys by company doctors showed that there was relatively high incidence of absenteeism in the 45-54 age group, with the proportion of low-status jobs and women being higher than average. Women are incidentally over-represented in lower-status jobs. There are fewer problems in managerial posts, where job rotation and mobility are already operating.

In 1994 the first specifically targeted interviews were conducted with ten staff in the above-mentioned over-45 group. The aim of these interviews was to find out the group's attitude to their job. The memo drawn up as a result of these interviews led in turn to a number of recommendations, including one to intensify the career review interviews, and not only to pay more attention to people in the same post for ten years or more, but to start as early as after five years.

### \* Assessment interviews

The company is considering supplementing the performance and career review interviews with assessment interviews, in which assessment is based on planning and review. Certain agreements are made in advance and afterwards employees are rated on the results. This can serve as an instrument of career policy and has been presented as such through the works council to the sounding board group. Since the preconditions of an assessment interview have not yet been met they have not been systematically introduced at the time of writing.

### \* Mobility

In addition a start has been made on achieving the mobility standard of 20 transfers a year. At the time of writing 8 transfers had been effected. The aim is not only internal, but also external mobility, as in the following example:

In an interview with an employee in his early thirties, it was noted that he has eventually become bored with his job and that there are few opportunities for change for him within the organisation. As a result he wishes to look outside the company. For two years he has been studying part-time for an MBA degree. The company is paying the costs (NLG 75,000) and he gives up one day's pay and attends the course in his own time. In exchange he has agreed that his contract be converted to a temporary two-year contract, meaning that he will have no entitlement to redundancy pay at the end of that period.

There is no barrier in the organisation against allowing people to move to other companies, since there is precisely a need for new blood. At the lowest level trainees are taken on, which influences staff structure. With trainees the focus is on the career, not the particular post. The target is five

trainees per year and at present there are ten. These are recruited from technical universities and polytechnics. The employment of trainees has led to a reduction in the average age of the workforce from 40 to 39.

This reduction in the average age can also be accounted for by the fact that last year approximately ten people exited under the over-55 severance scheme. Other schemes include pre-early retirement at age 60 and early retirement at age 61.

Early retirement will eventually be phased out. It will be replaced by an individualised system, the flexible retirement scheme (FUR). At present there is a scheme forming part of the collective wage agreement, allowing for voluntary reduction of 5 per cent in wages in return for one day's less work per week at age 57, and 10 per cent in return for two days' less work at age 59.

### 5.2, 7.1 95. **Hoek Loos Gassen Nederland: performance interviews and job transfer (Netherlands)**

In recent years the average age of the workforce in this company has risen. This prompted consideration of an adjustment in personnel policy. An age-aware personnel policy has been introduced in consultation with trade unions and works councils. The basic principle is that expertise and know-how, skills and mental and physical capacities should be important determining factors in measuring employees' job performance. As a result, a policy of not offering performance interviews to staff aged over 55 was abolished. On the basis of these interviews incidental transfer to different jobs may take place or there may be some adjustment in responsibilities.

Hoek Loos employs 798 people. Almost 33 per cent are aged between 40 and 50, and 24 per cent are over 50. In short, 57 per cent of the staff at Hoek Loos can currently be classed as 'older' employees (40- plus). In recent years the average age has risen from 39.6 in 1991 to 41.7 in 1993, a rise of over two years. The age makeup of the workforce prompted consideration of an adjustment in personnel policy. An age-aware personnel policy was first discussed by way of orientation with the works council and the trade unions, after which the topic was placed on the agenda of the periodic consultative meeting between Hoek Loos and the trade unions. The basic principle was that expertise and know-how, skills and mental and physical capacities should be important determining factors in measuring employees' job performance. No prior distinction is made between age categories. This is why Hoek Loos does not use the term 'older staff policy', but 'age-aware personnel policy'.

The policy paper on age-aware personnel policy presented by the working party in 1994 contains the following assertion: 'Age is only one of the factors which can cause staff problems in performance. It is a factor which never occurs independently, but is affected by or linked to other factors.'



Implementation of a new policy is seldom a matter of short-term planning. Consequently it is a process of development in which few concrete examples are yet available.

However, as regards performance interviews there is a visible result:

- In the (recent) past no performance interviews were conducted with staff over 55. With effect from 1 January 1995 interviews will take place with every member of staff regardless of his or her age. One result of this is that partly on the basis of these interviews incidental transfer to different jobs may take place or there may be some adjustment in responsibilities.
- A good example is the transfer of a safety expert. This man had been employed in this capacity by Hoek Loos for thirty years and was ready for a new challenge. Hoek Loos now provides its own courses. In order to accommodate the wishes of its employee and in order to be able to make efficient use of his expertise and experience, he was offered a place in the training scheme at Hoek Loos. He now writes the courses himself, giving his knowledge and experience full scope. A wise move for both the employee and the organisation.

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### **96. FORUM Vitaal Leraarschap (Vitality in Teaching): age-aware personnel policy (Netherlands) 5.2, 7.1**

The accent in this community initiative is mainly on the development of age-aware personnel policies in the teaching profession. A research project examining the potential for such an initiative has recently been completed. On the basis of the findings FORUM will compile a brochure pointing out to schools the benefits of developing age-aware personnel policies. Another initiative is the Job Exchange project. This initiative allows teachers to be seconded on a voluntarily basis to do a different job on a temporary basis. This 'exchange job' may be inside or outside education. Those participating in the programme have mainly been aged over 40.

FORUM describes itself as 'an independent platform for teachers and headteachers looking for inspiration, support, stimulus and information to help professionalise the job of teaching and the school as an organisation'. As such then it is not a company, but a so-called community initiative. The special feature of this initiative is that it can serve as an example of how through communal effort a creative age-aware policy can be developed by relatively small labour organisations.

FORUM was set up in 1994 as a direct consequence of the recommendations of the Van Es Committee which in 1993 examined the options for revitalising the job of teaching. This was felt to be necessary in view of the high sickness and absenteeism statistics, particularly among older teachers. In addition the anticipated increased age of teaching staff in the next few decades increased concern about working conditions in this sector. In addition to a number of diverse plans the accent in FORUM is mainly on the development of an older staff policy and age-aware personnel policy. In addition the Wisselwerk (Job Exchange) project is managed and supported by FORUM. This latter project is also in practice a clear example of good age-related policy. For that matter, in the organisation's philosophy such a policy begins not only 'after one has turned forty',

but should begin with the supervision of teachers entering the profession. The practical experience of Job Exchange shows that while the formula appeals to all age-groups, the 40-60 age group, with 65 per cent of all applications, plays a very significant part.

The age-aware personnel policy project is still in the preparatory phase. At this moment a research project - carried out by the Tilburg Institute for Labour Affairs (IVA) - has been completed in which the opportunities for developing such a personnel policy at the large number of schools was investigated. On the basis of the findings of this research project FORUM will compile a brochure pointing out to schools the opportunities for developing their own age-aware personnel policy. The brochure will use examples of good practice.

The Job Exchange project was launched at the end of 1994 and appears to be a promising move towards increasing the mobility and career development of teachers. The core idea is to allow teachers, through a system of secondment, voluntarily to do a different job on a temporary basis (for between 3 months and 2 years). This 'exchange job' may be both inside and outside education. In order to make this exchange possible a network of regional contact points with intermediaries who match supply and demand (candidates and hiring institutions) has been set up. Up to now over 600 candidates have registered, mainly in the 40-plus age group. At the time of writing contracts have been signed for over 40 candidates, mainly from the 40-plus group, while a few dozen more are in the process of being finalised. The provisional experiences of candidates and the hiring and supplying organisations are positive.

## 2.5 EVALUATION OF PERFORMANCE

### 97. West Flemish Observation and Therapeutic Centre (Belgium)

This is an observation and treatment centre for children and young people with severe psychological problems. Working with difficult children requires a great deal of motivation. Older tutors particularly may encounter considerable mental or physical problems in daily supervision of difficult children. They are often (unjustly) blamed by younger colleagues when problems arise in the educational team. For this reason special attention is paid to employees aged 40 and above. The group leader has a daily supervision session with each supervisor and older staff are given extra support and encouragement.

The West Flemish Observation and Therapeutic Centre in Bruges is an observation and treatment centre for children and young people with severe psychological problems. In this residential institution there are 60 beds in two institutions (one for children and one for adolescents). Fifty-five people are employed there, two thirds of whom are women. The maintenance and kitchen staff work part-time, the other services (tutors, social assistants, psychologists, psychiatrists and administrative personnel) work full-time.

Daily support is of great importance to tutors, young and old. Working with difficult children requires a great deal of motivation which can be stimulated by the group leaders. Older tutors



particularly may encounter considerable mental or physical problems in daily supervision of difficult children. They are often (unjustly) blamed by younger colleagues when problems arise in the educational team. For that reason special attention is paid to these people aged 40 and above. The group leader, a tutor who is given remission, has a daily individual interview with his supervisors. In the case of older staff express understanding is shown for their often difficult situation. In these interviews they are given extra stimulus and support and appreciation by the group leader.

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## AGE SPECIFIC POLICIES

2.6

### 98. Federation of Netherlands Trade Unions (FNV): negotiation and promotion of age-aware personnel policy (Netherlands)

5.2

Recently a two-year research project was carried out in the FNV's own organisation. The overall aim of the project was to identify ways of improving the working environment for older workers. Prompted by the research report there have been a number of follow-up activities. For example, a conference was held in the textile industry with the aim of devoting more attention to age-aware personnel policy in the collective wage agreement. With the encouragement of the FNV a pilot scheme has been launched in the motor industry to reskill older workers.

With over 1,000,000 members the FNV is the largest trade union organisation in the Netherlands. With its affiliated unions, such as the Industry Union, the Service Union and the Transport Union, it is influential in many branches of industry in the field of terms of employment schemes in collective wage agreements. Besides well-known collective wage agreement undertakings on wage trends, secondary employment benefits and exit schemes in the form of early retirement and pensions, in recent years a great deal of attention has also been paid to problems surrounding demographic trends in the population at large and by extension in the working population, ie trends in the labour market.

For example, in 1991-1992 a two-year project 'growing older at work' was carried out in the FNV's own organisation. The question underlying the research project was: 'How can the position of older employees (m/f) be improved?' This question was partly inspired by the desire to anticipate the expected wave of ageing in the working population. The project not only contributed to a new approach to the trade union movement's policy, but also initiated and encouraged the necessary debate on this topic with, for example, employers' organisations and government.

The project research report includes a number of recommendations such as: the drawing up of a policy paper by FNV in consultation with FNV policy-makers and older employees. Prompted by the research report there were a number of follow-up activities in 1992. These included the writing of a discussion paper aimed at allowing older employees to contribute to the discussion on older people and work. As a result of this process a policy paper emerged. The resulting manual is a

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basic document for using in giving concrete form to policy on older people in organisations. This material was also used at a study day for works councillors.

A number of concrete results achieved by the FNV:

- \* A branch-specific conference was held in the textile industry with the aim of devoting more attention to age-aware personnel policy in the collective wage agreement. The conference led at any rate to the compiling of a brochure for this branch of industry.
- \* In the metalworking industry a study is being carried out into the performance of the over-40s. With the encouragement of the FNV a pilot scheme has been launched in the motor industry to combat fear of failure in those over 40. That fear has arisen from continuing automation. People in this sector now receive training in the evenings on learning to use computers, etc.
- \* Also in the metalworking sector an age-aware policy 'avant la lettre' was introduced, through which that subsidy for training policy is provided by the district committee.

## 5.2 99. The General Employers' Association (AWV): negotiation and promotion of policy (Netherlands)

This employers' federation plays an important part in encouraging age-aware policies in companies. It acts directly or indirectly as a negotiating partner in a large number of collective wage agreements. Research it has conducted shows that, in a large number (65 per cent) of collective wage agreements, attention is paid to early retirement/pension, older staff policy, and age-aware personnel policy. AWV has had the issue of policy on older workers on its agenda for a number of years and also regards it as a matter which must be promoted with the membership.

The AWV is an unusual association among entrepreneurs' organisations in the Netherlands. It is not a sector association, because it organises various sectors and in principle companies from any sector can join. Nor is the AWV an umbrella organisation like the VNO or NCW, but with its several hundred member-companies and several dozen member-organisations occupies an intermediate position. In this way over 1700 companies are currently directly or indirectly (through an affiliated member-association) affiliated to the AWV. In another respect too the AWV is an unusual entrepreneurial association by Dutch standards, in that it is one of the few associations purely for employers. It is also exclusively concerned with the social interests of its members, interests in terms of employment and industrial relations. With its over 1,700 directly or indirectly affiliated industrial or non-industrial companies from 45 sectors with a total of over 500,000 employees it is the largest employers' association in the Netherlands.

The AWV plays an important part in respect of (age-)aware social policy in companies. On the one hand it acts directly or indirectly as a negotiating partner in a large number of collective wage agreements. On the other hand it performs an important service-providing and often mobilising



#### \* (Age-)aware social policy and collective wage agreements

The AWV is involved in the conclusion of over 200 collective wage agreements. An evaluation for 1994 carried out by the AWV itself shows that in a large number (65 per cent) of collective wage agreements attention is paid in this context to early retirement/pension, older staff policy, and age-aware personnel policy.

The most important focus of attention and negotiation (still) turns out to be early retirement and/or other pension schemes: in over half the collective wage agreements the discussion is about continuation or abolition of the early retirement/pension scheme and possible alternatives. According to the AWV 'many members are confronted with the rising costs and inflexibility' of such schemes. In a quarter of the collective wage agreements policy on older people is put in a broader perspective and in a small number of cases there is evidence of age-aware personnel policy.

Collective wage agreements reached on early retirement/ pensions differ quite widely. In most cases people have opted provisionally for a study of options for changes in the existing early retirement/pension schemes. In only six collective wage agreements has there been a decision to discontinue early retirement, in seven cases it was decided to raise the early retirement age, while in two cases the early retirement age has been lowered. In fourteen collective wage agreements the parties have agreed (in due course) to replace early retirement by a flexible exit scheme.

As regards policy on older staff, in eighteen collective wage agreements older staff schemes have been agreed or modified. In over half the cases there has been an increase in the number of older staff days off. In five cases older employees are enabled to work shorter hours.

In only a very limited number of cases (5 per cent) is there a really broadly based age-aware personnel policy. In the collective wage agreements concluded in 1994 there are three or four cases in which the term 'age-aware personnel policy' is used. In practice this usually means the combination of the early retirement/pension problem and the older staff issue. In those cases 'the preference is expressed for an integrated approach to policy on older staff'. How this is to be given concrete shape in practice remains unclear. In one of the large companies (KPN) the further step has been taken of laying down the age-aware personnel policy in a separate protocol.

#### \* Service provision and mobilisation

From the various publications of the AWV and from conversations with responsible policy-makers (see also Part II) it becomes clear that the AWV has had the topic of policy on older staff on its agenda for a number of years and also regards it as a matter which must be promoted with the membership. Parallel with the publications of the employees' organisations FNV, industry union FNV and CNV, etc, in 1991/1992 the AWV published a paper at the end of 1992 under the title 'An Activating Policy on Older People; Towards an Age-Aware Social Policy'. In 1994 this paper had a sequel in the paper 'Flexible Retirement, Continuing Employability'. The title indicates that at grass roots level in the AWV there is considerable demand for alternatives to early retirement. Consequently various models for a more flexible and individually orientated exit

scheme are presented. In addition the AWW itself continues to emphasise the development of a broader social policy, 'focused on maintaining the motivation and employability of staff for as long as possible'. At a large-scale study day at the end of 1994 attended by approximately 200 members, this paper was the starting point for bringing the topic of age-aware policy to the attention of members again. In addition the AWW set up a project team on older staff policy, which in 1994 gave a large number (25) of presentations to members and was also involved in some 25 projects launched among members.

## 5.2 100. Boxtel Consultative Committee of Personnel Officers (BOP): a local initiative (Netherlands)

The aim of this consultative body for personnel officers is to achieve a communal benefit through cooperation - specifically in the field of personnel and organisation. There is discussion about opportunities in members' own organisations for the introduction of age-aware personnel policies. The organisation has decided to assist in the setting up of a vacancy bank among the participating companies, possibly in cooperation with the job centre. It is hoped that this vacancy bank will have a positive effect on the mobility of all employees through, for example, transfer, loan and exchange.

In 1992 the Boxtel Consultative Committee for Personnel Officers (BOP) was set up on the initiative of the Brabant/Zeeland Employers (BZW, Boxtel district). The aim of this consultative body is to achieve a communal benefit through cooperation - specifically in the field of personnel and organisation, by means of:

- \* transfer and exchange of knowledge
- \* promotion of training activities
- \* setting up a vacancy bank
- \* making the local labour market transparent
- \* joint leasing of an outplacement bureau
- \* advocating the location in Boxtel of a branch of the Working Conditions Service, with a view to reducing absenteeism
- \* developing possibilities for nursery care for the benefit of companies and their (female) staff
- \* the encouragement of a more age-aware personnel policy in organisations in the municipality of Boxtel

At present approximately 25 companies and institutions are participating in this consultative committee, represented by their personnel officers. As regards the encouragement of age-aware personnel policy there is discussion in the committee about opportunities in individuals' own organisations. Among the discussion and informative material used is material deriving from the



For the present age-aware personnel policy does not have a very high priority for business in Boxtel. One of the reasons is that many organisations are engaged in reorganisation. The occasional company has instructed its personnel officer to write a policy paper. Hence the visible effects in the short term are not great, but it is hoped and expected that this will improve in the future. In particular there are high hopes of the initiative to set up a vacancy bank among the participating companies, possibly in cooperation with the job centre. It is hoped that this vacancy bank will have a positive effect on the mobility of employees - including older employees - through transfer, loan, exchange, etc.

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## **101. LABOR: consciousness raising and encouragement of age-aware personnel policy (Netherlands) 5.2**

LABOR was set up in order to provide advice and information about age-aware personnel policies. Activities have included: a film on the subject of older workers; the distribution of brochures and other informative material to a large number of organisations and institutions; encouragement of discussion about the pros and cons of age-aware personnel policy in different fora, using publications and appearances on radio and television. Contacts have been built up with the management of over 400 companies and institutions, especially large and medium-sized companies. In addition there is regular consultation with personnel officers and trade union representatives.

In 1991 a suggestion was made by a working party in the field of policy on older staff as part of the social renewal of Rotterdam to undertake activities for the improvement of the position of older staff. The so-called Older People's Contact Group, taking an initiative in the field of policy on older people, provided a start-up budget for the carrying out of a project. It did so to encourage the development of a more 'age-aware personnel policy' in organisations in the Rotterdam region.

With the help of the KVM Consultants BV management consultancy, specialising in personnel-management questions, the project finally got under way at the beginning 1992 under the name LABOR (Consciously Organising Age and Labour in the Rotterdam region). Meanwhile the project has been converted to the form of a foundation.

In the first instance the emphasis was on information and information provision to organisations in the region. Later its responsibilities were broadened to:

- \* investigation and listing of opportunities in the field of age-aware personnel policy
- \* organising workshops and courses
- \* the further development of informative material, and
- \* the development of a 'network'

In the past few years LABOR has built up a good reputation, nationally as well as regionally, as an institute which works actively towards the development of age-aware personnel policy in

organisations. Besides reaching many hundreds of people, particularly personnel officers from many different sectors, through meetings, from short gatherings to conferences, LABOR has recently, among other things:

- \* made a film on the subject, giving a picture of the position of older (50-plus) employees. This film has been shown on (local) television stations in the large towns, etc;
- \* distributed brochures and other informative material to a large number of organisations and institutions;
- \* encouraged discussion of the pros and cons of 'age-aware personnel policy' in all kinds of forums, using publications and appearances on all types of radio and television programmes.

In this way contacts have been built up with the (personnel) management of over 400 companies and institutions, especially large and medium-sized companies. In addition there is regular consultation with personnel officers and figures from the trade union and co-partnership world, in the form of sounding-board group meetings.

At present new activities are in preparation, including:

- \* a project to encourage mobility in (regional) education
- \* research on the position of older employees
- \* the development of career policy for older employees in the present city districts

The sum of these activities has helped ensure that in a significant proportion of the companies and institutions with which contacts have been built up measures are being taken to improve the position of older employees and impetuses have been given to modifying personnel policy.



Chapter Four

Other Examples of Good Practice

## **I FLEXIBLE WORKING**

### **FLEXIBLE WORKING HOURS**

**3.2**

#### **102. Fidisco NV (Belgium)**

This company is in the financial sector. It has provision for a reduction in working hours for older staff: men aged 60 and above and women aged 55 and above may work two hours per week less without loss of earnings. It is also possible to convert this reduction in working hours into extra holidays. Older employees also have the option of an annual medical examination.

Fidisco (Brussels) is a limited company in the banking sector, specializing in mortgage loans. Ninety-seven people are employed there, except one white-collar worker, with a proportional division into men and women. The employees may adopt a very flexible working pattern. For example, five women aged between 35 and 40 work 50 per cent. Three women aged 35 work 80 per cent, and 10 women work 90 per cent.

The company has provision for a reduction in working hours for older staff. Men aged 60 and above and women aged 55 and above may work two hours per week less without loss of earnings. Everyone who is eligible takes advantage of this system which has existed for about five years. At the moment four white-collar workers are involved. It is also possible to convert this reduction

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in working hours into extra holidays. By means of this measure the management wishes to reduce the working rhythm somewhat for older employees.

In the company older employees also have the option of an annual medical examination. Normally there is a medical follow-up every three years. In this way certain diseases or complaints can be diagnosed in good time. The company medical service generally reports only to the employee in question. If it is regarded as desirable that an employee should work less or be considered unfit for work the service informs the management.

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#### **4.1 103. Bekaert NV (Belgium)**

Bekaert NV is a commercial steel producer. Employees of a minimum age of 45 who are difficult to deploy are not dismissed, but are transferred compulsorily to a post which is occupied by two people. Such employees work one week and are laid off for the following week. This transfer is decided centrally because the company is anxious to ensure that the same criteria are used consistently. Usually such a transfer is decided on medical grounds. There are also ergonomic projects in the company.

Bekaert NV produces a number of products for sale (such as posts and gates) and special steel wire for industrial use (such as spring and staple wire). The company is based in Zvevegem. The company also manufactures cables for the transportation of heavy products such as granite and has a fibres division. The company employs 3200 staff, including 2200 manual workers. The latter work in all kinds of shift systems (two-shift systems, three-shift systems, weekend systems, etc).

Employees of a minimum age of 45 who are difficult to deploy are not dismissed, but are transferred compulsorily to a post which is occupied by two people. This is called double placement. Such employees work one week and are laid off for the following week. Some workers are satisfied with the system, others are not, because they regard it as a demotion with loss of earnings. This transfer is decided not at departmental level but centrally, because the company is anxious to ensure that the same criteria are used consistently. Usually such a transfer is decided on medical grounds (based on the report of the company doctor).

There are also a number of current ergonomic projects in the company. For example, the working conditions for all jobs have been detailed. If required, special chairs are installed or certain operations are brought up to head height. If necessary aids, such as tackles, are installed to make lifting easier.

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#### **3.6, 7.4 104. Estate Agent, Residential Lettings and Financial Services (UK)**

Expectations about falling numbers of school leavers led this organisation to adopt flexible working arrangements. For example, management are aware that women workers may be caring for elderly relatives and are prepared to be flexible in terms of working hours. Thus

requests to take a particular day off each week are treated sympathetically. The organisation also employs 'twilight workers' for three or four hours in the evening who, because of domestic or other circumstances, are unable to work during the day. In addition, the organisation operates a career break scheme with workers brought back into the organisation from time to time to find out what is going on in the business.

This commercial company employs 302 men full-time, 188 women full-time and 38 women part-time. Most staff are employed in sales positions. On the estate agency side of the business older staff are concentrated in management posts whereas on the financial services side older staff are to be found at all levels.

The company is aware of the implications of falling numbers of school leavers for its workforce although management think that this problem has become less acute because of the recession in the industry. In response the company has looked at ways of retaining older staff and offering flexible working hours which suit people who only want to work a few hours per day. This includes part-time working or term-time only working. Management are aware that some women workers might be caring for elderly relatives and are prepared to be flexible in terms of working hours. For example, requests to reduce working hours or to take a particular day off each week are treated sympathetically.

The company also has a formalised career break scheme. Staff are kept on a small retainer and are brought back into the organisation from time to time for a short period so that they can find out what is going on in the business and keep involved. They can be re-employed for up to eight years afterwards. This policy was aimed at those people who wanted a break from work while their children were young and perhaps going through primary school. The company also operates a flexi-time system which gives people flexibility in terms of their working hours.

The company also employ 'twilight workers'. Such people come to work from five or six o'clock at night for three or four hours. Because of their domestic or other circumstances, such employees cannot work during the day or, in some cases, actually do another job during the day and need the extra income. The jobs concerned involve basic clerical and administrative tasks.

Training is available to all staff regardless of their age. For example, a newly promoted manager aged 52 was recently sent on an employee management training course. The company has carried out several programmes of early retirement and, according to a senior manager, has lost staff who still had a considerable amount to offer the organisation. In particular, he thinks that older staff can bring their experience to bear in a situation where they can see that a solution suggested by a younger manager has been tried before and has failed. Specifically, the senior manager referred to the different discipline of managing a company during a period of recession, something many younger managers have never had to do. However, he has been unable to convince colleagues of the value of taking a different approach.

### 3.5 DEMOTION (WITH LOSS OF EARNINGS)

#### 5.2 105. Barco (Belgium)

This organisation specializes in the development and sale of electronics for industrial uses. Ongoing in-service training is provided for all regardless of age. All staff are screened annually to see whether they meet their job criteria. Should an older member of staff find it difficult to cope in a job there are several options. For example the employee may be given the option of changing jobs. In some cases an older person will work in tandem with a younger colleague. Sometimes the only way out is demotion. In this case it is emphasized in an individual interview that it is not a question of degradation of the employee.

Barco (Courtrai) specializes in the development and sale of electronics for industrial uses with a worldwide target group. For example they are currently developing a production management system for spinning mills. A great deal of attention is paid to research and development. In marketing and sales know-how is also very important. The market segment in which Barco operates is characterized by constant renewal and intense competition. For this reason a great degree of staff flexibility is demanded. The company is also characterized by a flat organizational structure, which enables it to react very quickly to new trends in the market.

Barco employs 1830 people. Of these 57 per cent are men. The majority (92 per cent), are employed full-time. Since staff have to be able to keep up with technology because of the competitive environment a great deal of attention is paid to older employees.

In the first place the company culture ensures that staff, both young and old, are willing to participate in ongoing in-service training. The courses are organized both internally and externally. Staff are also screened annually to see whether they meet their job criteria. This is done in concrete terms, for example through performance appraisal interviews. Should a burn-out occur in an older member of staff, there are several options. In the first place the person in question is given the option of changing jobs. For example it happens that a civil engineer from the R&D department is transferred to the commercial or logistics division. However this poses two problems: there are only a few vacancies in these divisions, and moreover the engineer has to have sufficient skills in order to be transferred. In order to avoid someone being side-tracked, in some cases it is arranged for him to work in tandem with a younger colleague. Usually this has a very stimulating effect, for both the older and the younger employee. Sometimes the only way out is demotion. In this case it is emphasized in an individual interview that it is not a question of degradation of the employee. Although those around him often react negatively to demotions, some employees are happy with their new situation although it implies a certain loss of earnings.



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## **FLEXIBLE RETIREMENT/EARLY EXIT SCHEME**

3.7

### **106. Agricultural Co-operative (France)**

2.2, 2.5,  
3.8, 4.1

This organisation is involved in several areas of the agricultural sector. The company decided to introduce a phased early retirement scheme during 1995 in order to avoid abrupt dismissals and demotivating older employees. It enables older staff to leave the company gradually while at the same time training younger employees. There are no age limits on access to training courses. The company also operates a policy of trying to prevent deterioration due to physical stress at work. A consultant has been appointed to train employees in correct movement and posture. Transfer to different duties is also common.

‘Agri Co-op’ is a multi-purpose enterprise which operates three different businesses: arable production - mainly the collection, storage and marketing of cereals; the supply of fertilizer, agro-chemicals, and seed grains to arable farmers; and animal production, which provides animal farmers with all the advice and technology they require, and markets the animals.

Located in a predominantly rural area, the Co-operative had 445 employees at the end of 1993, of whom 42 per cent were manual workers. Their average age in 1994 was around 38 years, following a redundancy programme implemented in 1993.

Indeed, following the new Common Agricultural Policy (CAP) of 1992, which redefined the objectives of agricultural policy, and a significant fall in the number of farmers, ‘Agri Co-op’ was forced to consider the introduction of a redundancy programme in order to restructure its activities. The programme affected 65 people and made use of early retirement, natural wastage, and leaving incentives in preference to redundancy payments. About thirty people aged between 20 and 25 years were subsequently reallocated to different posts, and this reduced the average age of staff to a certain extent. However, the company decided to introduce a phased early retirement scheme during 1995 affecting twenty people with a view to avoiding abrupt dismissals and demotivating staff in the 45 to 50-year age group. The management of ageing staff had been a problem up to that point, but no longer seems to worry the company, which feels that, thanks to the redundancy programme and the phased early retirement scheme, the matter has been resolved.

Even though the company recognizes the need to retain older staff for their skills, their experience, and to maintain the corporate culture, it considers that they nevertheless experience difficulty in adapting to new technology, and deems it necessary to recruit younger and better trained staff. This is why it regards phased early retirement as an excellent solution, since it enables older staff to leave the company gradually, whilst at the same time training the youngest employees. This prevents the loss of skills and accommodates the desire to leave amongst staff who have served for 40 years. Thus the company continues to recruit people over 40 years of age, but not those over 50 years.

Training accounts for between 3.5 and 4.5 per cent of the staff overhead. It serves three objectives: motivation, understanding new technologies, and extending the mental horizon of staff. Everyone attends a training course a few months after their appointment. No age limits apply to training, but the company does not invite older staff to participate in training unless they request it. Efforts are nevertheless made to train older staff transferred to new duties, as for instance in the case of a salesman who wishes to transfer to clerical duties. Since 1984, the company has committed itself to developing a training programme under the terms of an agreement with the Ministry of Employment.

'Agri Co-op' also operates a policy to prevent deterioration due to physical stress at work. Working conditions are frequently improved (4.1), mainly in connection with manual jobs involving arduous, repetitive movement. A consultant has been appointed to systematically investigate job tasks and to train employees in movement and posture. Five years ago such training was directed specifically at older staff, but today all staff receive it. Transfer to different duties is, moreover, a continuous process, affecting 3 staff per month on average as a result of a major internal campaign directed at all personnel. This is the point at which the company calls for an assessment of the individual employee's skills.

Although the company continues to use early retirement to manage staff departures, it is nevertheless endeavouring to apply a more protective policy towards its staff and the problem of work-related physical deterioration.

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### 3.8 GRADUAL RETIREMENT SCHEME

#### 2.2, 3.6 107. Insurance Company (France)

This Insurance Company has run three programmes of phased early retirement. The aim is to replace staff by recruiting younger people, to promote work sharing, and to avoid the sudden loss of skilled labour. There are no age restrictions on eligibility for training although older staff are less enthusiastic.

The Insurance Company is a very large insurance company in the competitive personal insurance market. It employs 18,800 people of whom almost half are aged between 35 and 44 years. More than two thirds are not educated to *baccalauréat* level [approximately equivalent to 'A' level standard]. The branch office specifically studied is located in an urban area, and employs 435 people, mainly women. Two thirds of staff are aged between 35 and 44 years. Part-time working is extensive (15 per cent of staff).

Staff numbers fell at the branch office until 1992, when they began to rise again, following the trend for the company as a whole. Hardly any recruitment has been conducted at the branch office over the last ten years, the preference being to appoint existing staff to any vacancies arising and to train them appropriately. Natural wastage is very low, given the almost total absence of old employees.

Phased early retirement was offered to staff on three occasions: 1989, 1991, and 1994. The aim is to replace staff by recruiting younger people, to promote work sharing, and to avoid the sudden loss of skilled labour. It is never a question of avoiding redundancies. Phased early retirement is presented as one means of extending part-time working and annualization of working hours, but is little used at branch office level because so few staff are affected.

Ongoing training allows staff to be continually retrained for the company's requirements and changes in the nature of duties. There are no age restrictions on eligibility for training, albeit that older staff are less enthusiastic. The recent decentralization of training activities has made it possible for greater numbers of staff to be trained.

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### 108. Construction Company (France)

Early retirement was abolished in this company in 1993 and was replaced by phased early retirement as part of an apprenticeship scheme. The objective is to make the transition from work to retirement smoother, to enable recruitment and to use the oldest staff to train the youngest. However, phased early retirement presents many difficulties: the reluctance of employees and the reluctance of site foremen confronted by the problems of operating part-time working on building sites.

The Construction Company is a small business located in an urban area, and part of a private group specialising in building and public works. It employs 350 people, mostly male labourers with few qualifications and foreign nationality. The workforce has a concentration of employees at the top of the age pyramid, and the average age of intermediate grade site foremen is 50 years.

After 1975, the company passed through a succession of periods of economic difficulty which resulted in a reduction in staff numbers and very intermittent recruiting. Early retirement was used on a massive scale because of the onset of physical deterioration from age 50 onwards. This gave rise to a loss of skills and prevented recruitment.

The use of early retirement was abolished from 1993 onwards and replaced by phased early retirement as part of an apprenticeship scheme. The objective is to make the transition from work to retirement smoother, to legitimate recruitment despite the economic problems facing the sector, and to use the oldest staff to train the youngest. Nevertheless, phased early retirement presents many difficulties: the reluctance of employees in a trade where they often continue to work after age 60, and the reluctance of site foremen confronted by the special problems of operating part-time working on building sites. Meanwhile, the apprenticeship system suffers from the unattractiveness of the building trade in the minds of young people and from the widespread lack of ability to document and communicate a particular skill (poor command of the French language, especially amongst foreigners).

## 2.2, 6.4 109. Energy Supply Company (France)

This company produces and distributes gas and electricity. Management have come to the conclusion that early retirement schemes are no longer justifiable. Therefore, in 1992 the company began operating a labour and skills advance planning system. This system has included a specific new scheme for supervisors nearing the end of their careers. The half-time working incentive scheme, an extension of part-time working, is aimed at supervisors aged over 55 years, and pays them 70 per cent of their salary. Upon retirement, each supervisor is reinstated to full-time working and their pension calculated on the basis of full-time pay rates.

'EnerCo' is a public company specialising in the production and distribution of two competing forms of energy: gas and electricity. It had 143,836 employees at the end of 1993, mostly of supervisor grade. The proportion of employees aged over 50 is particularly low (2.1 per cent).

The company underwent a period of heavy recruitment from 1980 to 1982. From 1985 onwards the numbers taken on declined sharply. In 1992, for example, there were 1,018 fewer recruitments than in the preceding year. The numbers of staff leaving to retire have grown correspondingly. In 1993, the average age of retirement was 54.3 years. The proportion of supervisory staff nearing retirement (i.e. less than six years away from retirement) amounts to one fifth of all staff.

In 1972 the company began to make it easier for supervisors to take early retirement (age condition) if they were over 55 years old (age requirement), and had been in the company's service for at least 25 years (length of service requirement). Restructuring measures meant that there had been a surplus of staff in this age-group for at least a year. In June 1989 this originally restricted scheme was extended to encourage voluntary redundancy irrespective of age of all staff who had completed 37.5 years of service. Some 6,000 supervisors took advantage of this scheme between June 1989 and June 1992. This early retirement scheme has been complemented by schemes for retirement at or after age 55, conditional upon length of service, of staff in physically demanding posts and/or in poor health.

The company eventually came to the conclusion that early retirement schemes could no longer constitute the sole instrument of management for dealing with the imbalance between the number of employees and the number of available jobs. In 1992 the company therefore began operating a labour and skills advance planning system. Since June 1992 this system has included a specific new scheme for employees nearing the end of their careers: the half-time working incentive scheme, an extension of part-time working, is aimed at all employees aged over 55 years, and pays them 70 per cent of their full wage. Upon retirement, each employee is reinstated to full-time working and his pension calculated on the basis of full-time pay rates. Incentive scheme half-time working is linked to company apprenticeship and training programmes, and to adjustments to working hours.



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## 110. Railway Company (France)

2.2, 3.2,  
4.3

This is a public company which holds a monopoly of rail transport throughout France. A phased early retirement programme for employees was introduced in 1995. It allows for half-time working from the age of 50 at 75 per cent of previous earnings. The company recruits one new worker for every three workers aged under 52 and every four workers aged over 52 benefiting from the scheme. There are no age restriction on eligibility for training. An apprenticeship scheme has recently been established. Most of the mentors are older staff. Requests for older workers to transfer to less arduous duties are considered favourably by management.

'RailCo' employs some 180,000 staff, some working at fixed locations, and some mobile. A very wide range of crafts and professions are represented, some of which are unique to the business.

It is a current concern of the company to rebalance the staff age pyramid. A relatively large proportion of the workforce is nearing retirement age. There have been periods of intensive recruitment in the past, but over the last ten years they have become increasingly rare. Personnel are not therefore being replaced, even though the age of retirement is set at 55 years (retirement age is 55 for fixed-location personnel and 50 for mobile personnel). The majority of employees between 50 and 55 years of age joined the company at a very young age and share a very strong corporate culture: this sometimes acts as an obstacle to organizational progress. Nowadays staff are recruited from an older age group, typically people around thirty years of age. Problems can arise between these two groups of people.

Average staff ages will fall in the years ahead. The preponderance of old staff is a major concern of the company, but is not regarded as a strategic issue.

Characteristics of older staff: experience, corporate culture, recollection of the company's past. Their most unfavourable characteristic definitely lies in their proven ability to resist change. Older staff cling tightly to systems and rules which are now obsolete. These employees learned their trade in an era when the company was organized along quasi-military lines, and they can find it hard to cope without this.

Under the terms of a collective agreement on part-time working, a Phased Retirement Programme (CPA) was introduced in February 1995. The CPA is a scheme for half-time working which provides a transition between working life and full retirement. This period of an employee's working life can provide an opportunity for him to assess his professional experience and to share it with new recruits. A permanent employee, who is aged between 50 and 54 years of age, has a minimum of 15 years pensionable service, and is physically capable of performing his duties, is eligible to benefit from the scheme, subject to the company's approval. In addition to salary received in respect of half-time working, the employee admitted to the CPA scheme receives additional compensation in respect of hours not worked, equivalent to 25 per cent of the standard daily rate of pay.

Throughout the term of the collective agreement (3 years from the date of its conclusion), the company undertakes to recruit new staff in accordance with the following rules: 1 new appointment for every 3 CPA participants less than 52 years old, and 1 new appointment for every 4 CPA participants more than 52 years old. Half-time working may take a wide variety of forms, and the employee can negotiate his own contract with his works manager. This constitutes a considerable novelty within the company. The main disadvantage of the scheme is its impact on work schedules, such as when several employees from the same team join the scheme at the same time. At the end of July 1995, 82 employees were participating in the CPA scheme.

No age restriction applies to eligibility for training (2.2) except in extreme cases (e.g. a request by an employee due to retire in a few months). Provided training relates to an employee's professional duties, it will be provided, irrespective of age. If requested for personal reasons, it may be denied if the employee is one or two years away from retirement. An apprenticeship scheme has been established. Eligibility for it depends less upon age than upon experience. In practice, most of the mentors are older staff.

Whilst there is no formalized policy for the improvement of working conditions for older staff, opportunities for transfer to alternative duties can be considered. Such matters are dealt with on an individual basis after consultation with the company doctor. Part-time working is gradually becoming more common, even though only two per cent of staff currently benefit from it. The opportunity for shorter working hours are theoretically available to all employees.

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**2.2, 3.2, 3.7**     **111. Agricultural Feedstuffs Manufacturer (France)**

In this company, older employees may experience difficulty with unsocial hours and an effort is made to place them in daytime shifts. Some managers over 60 years of age remain with the company. The company utilises phased early retirement schemes. The company recruits additional staff in compensation. There are no age restrictions on eligibility for training.

'Animal FeedCo' is a very large corporation employing some 15,000 people at 28 industrial sites. Most staff are male (two thirds of the workforce) and most perform manual tasks (70 per cent). The average age is 42 years, and the average length of service is 12 years. Staff turnover is very low, and less than 5 per cent in the case of managerial staff: people make their careers within the company. Few staff have been recruited in the last five years. Ninety per cent of those leaving the company do so upon retirement or early retirement. There have been no staff cutbacks in recent years. The various redundancy programmes applied have operated through age-related measures or redeployment to other production units.

In the years ahead, the average age of staff will fall. The company is planning to recruit staff, and intends to continue to use phased early retirement for older personnel. Age is not a critical factor in human resource management. Since working conditions are generally favourable, age has never really presented a problem. Some workshops operate on a 7-day week and 24-hour day basis.



Older employees required to work five 8-hour shifts may experience difficulty with unsociable hours, and an effort is made to place them in daytime shifts.

No recruitment occurs of staff over 40 years of age other than in exceptional instances.

Normal retirement age within the company is 65 years (collective agreement of the agricultural feedstuffs industry). If the company were to take the initiative in retiring employees who had both reached statutory retirement age and paid regular contributions for the qualifying period, this would constitute dismissal and lead to serious financial penalties. Consequently some managers over 60 years of age remain with the company. The desire to remain employed beyond 60 is not encountered amongst manual workers.

The full early retirement and phased early retirement schemes of the National Employment Fund are utilized on a quasi-permanent basis. When one production site is no longer involved, a redundancy scheme is introduced at a further site. The schemes of the National Fund for Employment are sometimes used without regard to the company's requirements in conjunction with compensatory recruitments. This can be a form of trade-off with the unions when negotiating the terms of a redundancy scheme.

The company utilizes the phased early retirement schemes (3.8) of the National Employment Fund as well as phased early retirements not linked to redundancy programmes, such schemes requiring it to recruit additional staff in compensation. The proportion of phased early retirements effected under the National Employment Fund scheme is 75 per cent.

The main advantage of this scheme is that it allows labour problems to be resolved without giving rise to human crises. Its main drawback appears to be that it can cause some disruption to work schedules. It can also generate extra overheads: e.g. when a salesman is on phased early retirement, costs can be doubled (car, relocation).

The pattern of part-time working hours adopted in cases of phased early retirement is entirely discretionary: the employee negotiates his contract with local management. Training (accounting for 4 per cent of the staff overhead) is always linked to the company's requirements. There are no age restrictions for receiving it. An agreement concerning training time is currently under discussion. All possible forms of modified working hours are employed by the company, and not solely in connection with older staff. Improvements to working conditions are an ongoing process, and are the subject of annual discussion with working conditions improvement committees.

It is not intended to prolong the service of older staff in future years. The company is considering continued use of early retirement schemes. All those concerned are satisfied with them: employees, unions, and management.

**1.2, 1.7, 2.1, 3.2**    **112. Sugar Company (France)**

The company is engaged in the activities of sugar production, refining, distilling, and packaging. No age barrier exists to recruitment. Staff participating in the company's phased early retirement scheme have some discretion with respect to the organization of their work schedule. Scheme members receive at least 90 per cent of their former income. Employees participating in phased early retirement are able to save up their leave entitlement so as to bring forward the date of their full retirement from the company. The company has sometimes called back former employees from retirement on short-term contracts.

'SugarCo' employs 1,900 staff at 10 different industrial sites throughout mainland France, the majority of whom are male (87 per cent). Most employees are unskilled manual workers (57 per cent). The average age of staff is 45 years, and this figure rises by one year each year.

Because the company has been undergoing restructuring every year since 1982, and has made very extensive use of National Employment Fund full early retirement in the course of a number of redundancy programmes. The departure of older workers has not been offset by any recruitment. Nevertheless, hardly any staff have been simply laid off.

Hardly any recruitment has taken place in recent years with the exception of a small number of managerial staff. No formal age barrier exists to recruitment, and one site recently appointed a personnel manager aged 50 years.

Phase early retirement has been in use since 1992. Subject to management consent, staff participating in this scheme enjoy a measure of discretion with respect to the organization of their part-time schedule: a worker could, for example, decide to perform his quota of work during the sugar harvest, which runs from October to December. One company site has reached an agreement under which two months of work is followed by two months leave. Because the change-round period is relatively brief, there is no need for readjustment to work. By contrast, phased early retirement staff at seasonally affected factories work for four or five months, then take leave for the remainder of the year.

There is consequently a training and adjustment problem which commonly takes the form of reminding staff about health and safety procedures. Because 'part-timers' are not present during the harvest period to participate in changes to production plant, their know-how is often out of step with new developments. They are therefore given a special course at the beginning of each sugar harvest, the principal themes being production targets, the manufacturing process, modifications and changes to equipment, work organization, and work safety. The course is spread out over ten days, and is conducted by company managers or outside specialists. Although they are 'old hands' in terms of their length of service, it is necessary to treat them almost as 'new recruits'.



Such older workers are a matter of concern for the company: 200 employees are beneficiaries of phased early retirement (77 per cent of those aged 55 or more), a considerable body of people participating in a single statutory scheme, and sharing specially arranged working hours. Even though this group of employees creates a fair measure of administrative complexity for human resource management, it nevertheless provides the company with a convenient method for keeping down staff numbers: employees leave the company's service in a orderly, peaceful way, obviating the need for recourse to drastic measures. Phased early retirement also enables the company to retain the expertise of older staff. Forecasts for future years do not in fact include any plans for the recruitment of additional staff.

In comparison with full early retirement, phased early retirement is a means of retaining older staff, although they are not retained after normal retirement age. Phased early retirement thus remains essentially an exit system. This fact should nevertheless be considered side by side with the complete abstention from using full early retirement. Compared to the preceding period, there has therefore been some progress, however modest, in the retention of older staff in employment.

The company guarantees scheme members a gross minimum income in respect of that portion of salary not maintained within the company equivalent to 70 per cent of the previous gross salary and projected over the whole period from the acceptance of its cost by the State until the conditions for entitlement to retirement pension benefits are fulfilled. If severance pay, retirement compensation, the grants provided by the National Employment Fund, and the additional amount paid by the company to achieve the guaranteed minimum income are all taken into account, phased early retirement scheme members receive at least 90 per cent of their former income.

The company has recently signed an agreement with the unions to establish a 'time savings bank' as specified by the Act of July 1994. The agreement has a term of 6 years, and its principal objective is to convert certain bonus payments into additional holiday entitlement. Employees participating in phased early retirement will be able to enjoy a privilege not available to other permanent staff: that of saving up their leave entitlement so as to bring forward the date of their physical retirement from the company, without altering the date of expiry of their contractual employment. Employees have hardly ever refused retirement. In such an eventuality, the company acts to place the employee in retirement.

On very rare occasions, the company has called back former employees, invariably senior staff, from retirement for short-term technical or consulting tasks. The persons so recalled were in all instances senior managers.

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### **113. National Bank (France)**

This organisation is engaged in both personal and commercial banking. It is planning to introduce phased early retirement incorporating a leave accumulation system. A part-time workers' charter of duties and rights is being developed. The possibility of introducing phased early retirement with consolidation of the working timetable is also being considered.

**2.5, 3.2,  
3.7, 4.3,  
6.2, 7.2,  
7.3**

**145**

'National Banking Co.' is a large organization engaged in both personal and commercial banking. It has branches in 70 countries. The Group employs a total of 44,000 staff, of whom 31,000 work in mainland France.

There is evidently a need to reduce staff numbers, and a start has been made on this process (in 1992 there were 32,999 employees). Large numbers of staff were recruited during 1968 to 1970, and because natural wastage is low, the average age of the workforce has risen. This is likely to result in a high number of retirements in the course of the ten years ahead, probably at a rate of between 1,000 and 3,000 per annum (compared to 148 in 1994, 277 in 1993, and 555 in 1992). Retiring staff will not be replaced because of major productivity improvements in the banking industry, growing competition, and falling profits. At present, more than half of the workforce have served for over 20 years.

The bank therefore faces a serious dilemma. On the one hand it needs to prepare itself to replace staff within ten years by taking on younger staff and training them (time required for training and promotion within the company), and thus to operate an informal recruitment selection procedure, if only for untrained staff. At the same time it has to hold back on recruitment in order to maintain its competitiveness. Managing the age pyramid is consequently one of the primary concerns of personnel management.

This concern with the age pyramid is, however, not really reflected either in training, to which the company devotes a substantial 5.43 per cent of the staff overhead, or in improvements to working conditions. Some measures have nevertheless either been implemented or are planned, such as career audits and performance appraisal. Exit schemes for older staff are the preferred instrument. Whilst full early retirement (for staff aged over 55 years and with 35 years' service) was abolished after 1992, consideration has been given to extending the use of phased early retirement within a new framework. Previously used in 1993, it failed to produce the desired effects, apparently because of the poor image of part-time working and the need to refresh staff skills after prolonged absence from work.

The bank is therefore planning to incorporate a leave accumulation system when it launches an upgraded version of its part-time working scheme. The object is to make the scheme attractive to managerial staff, who have so far disliked it. With this in mind, negotiations are taking place with the unions and the works council regarding the signature of a part-time workers' charter of duties and rights, and thus overcome the prejudices against it. It should be transformed into a worthwhile option and should not cut short career progression in too dramatic a way. The possibility of introducing phased early retirement with consolidation of the working timetable is also being considered: under this scheme, periods worked and periods not worked would be consolidated, and the resulting leave entitlement taken at the end of one's career. The company would pay 50 per cent of salary, to which the ASSEDICs (Associations for Employment in Industry and Commerce) would add 30 per cent of salary. The bank hopes that this scheme will attract more candidates. If the scheme goes ahead, it would also enable mentorship posts to be created so that departing staff could transfer their knowledge and experience to new appointees.



It is clear that age management presents a problem inasmuch as the bank sets great store by mobility, dynamism and receptiveness to new methods, especially in relation to some jobs. Age is thus often perceived as a factor which inhibits competitiveness and productivity.



#### **114. The Government Scheme for Phased Early Retirement (France)**

**2.4**

This scheme enables employees aged over 55 years to transfer to half-time working. In addition to the salary paid by the company, the employee receives an additional allowance equivalent to between 25 and 30 per cent of previous salary. Since 1994, it has been possible for working hours to be varied between 20 per cent and 80 per cent of the original full-time annual working hours, provided that the reduction in hours worked over the entire period of phased early retirement averages 50 per cent.

Phased early retirement is a government scheme created in 1985. It enabled employees aged over 55 years to transfer to half-time working, subject to specific conditions, which included their willingness to do so. In addition to the salary paid by the company in respect of hours worked, the employee receives an additional allowance equivalent to between 25 and 30 per cent of previous salary. In return, the company undertook to recruit additional staff which fully compensated for the man-hours no longer performed by those transferred to half-time working. The scheme remained little used prior to 1992, the number of participants from 1987 onwards varying between 3,500 and 4,500.

Two modifications were introduced in 1992 and 1993. In 1992, the phased early retirement scheme was altered in two fundamental respects: firstly, the clause requiring the maintenance of staffing levels was replaced by an undertaking to conduct compensatory recruitments or make a financial contribution; secondly, only one third of recruitments had to be drawn from applicants classified as priority cases. Phased early retirement is therefore aimed at two types of company:

- those which are in the process of reducing staff numbers and are thus enabled to avoid outright dismissals by transferring staff to part-time work (the company then making a financial contribution); and
- those which have moderate scope for recruitment, and are enabled by the transfer of older staff to part-time working to recruit new staff in numbers either wholly matching the number of scheme participants (recruitment undertaking) or partly matching that number (recruitment and contribution undertaking).

The hours worked are equivalent to 40 per cent or 50 per cent of the original annual working hours. Part-time hours can be calculated on a weekly, monthly, or annual basis.

Since 1994, it has been permissible for working hours to be 'annualized' over the entire period of participation in phased early retirement: the duration of part-time working can in fact be varied between 20 per cent and 80 per cent of the original full-time annual working hours, provided that

the reduction in hours worked over the entire period of phased early retirement membership averages 50 per cent.<sup>1</sup>

As a result, phased early retirement has increasingly emerged as an attractive alternative to the solution of full early retirement. The Ministry of Labour has, moreover, provided companies with an incentive by establishing a redundancy programme which allows the use of this scheme, and thus enhancing its wider use.

There has been a very sharp rise in the number of scheme participants from 1993 onwards: 97 per cent in 1993, and 80 per cent in 1994. There were 46,700 participants in June 1995. Phased early retirements now account for 22 per cent of all early retirements subsidized by the State.

Of all the agreements concluded with the Ministry of Labour in 1994, almost a quarter have committed companies solely to compensation of a financial nature. The progress of phased early retirement has therefore helped to reduce the number of dismissals of staff aged over 55 years.

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## 5.1 115. Ministry of Internal Affairs: mobility and research (Netherlands)

In this organisation a policy of early exit is to change in the near future. In addition, management is trying to introduce a more age-aware personnel policy. For example, the Partial Work Participation of Older Staff (PAS) scheme enables employees aged 57 and over, in return for a reduction in salary, to work a shorter week. In addition, mobility is enhanced by giving staff the opportunity to do another job or interim government job, for example for a year, on full pay and with a guarantee of return. The ministry also commissioned a survey into the performance of its older employees. Based on the findings a brochure was produced with the aim of changing the image of the older employee in the organisation. It was distributed to personnel managers in all departments.

With its 112,000-plus employees the Ministry of Internal Affairs is possibly the largest employer in the Netherlands. At the end of 1993 the average age was 32.22. The total number of employees aged 55 and over is 11,140 (9.99 per cent). In the past few years, like many large bodies, this ministry has been regularly hit by cuts which have resulted in reorganisations. In order to promote work for younger people policy has focused partly on encouraging the exit of older staff. This policy of redundancy is to change in the near future, and as a result the 'last in, first out' policy will apply in principle to the ministry too. On the other hand measures have also been introduced which basically form part of a more age-aware personnel policy and which apply to all ages in the organisation. These are specifically: career policy, mobility, management development.

One instrument for keeping older workers in employment longer is the institution of the Partial Work Participation of Older Staff (PAS) scheme. This scheme enables employees aged 57 and over, in return for part of their salary the paid reduction- of-working-hours (ADV) days and age-related days off, to work a shorter week. The aim is to prevent premature exit through invalidity



or early retirement by (temporary) removal of work pressure. In addition mobility is enhanced by giving staff the opportunity to do another job or interim government job, for example for a year, on full pay and with a guarantee of 'return'. This instrument is especially popular with the over-40s. Interest in such a change of working environment mainly emerges in the career review interviews.

The fact that the ministry is actually addressing the problems surrounding work and ageing is shown by its participation in the research for the publication by Boerlijst, *Over-40s in the Company*. This book examines the performance of the over-40s and makes recommendations for dealing differently with the ageing employee in the organisation. The ministry also commissioned a survey in its own organisation into the performance of ageing employees. Interviews were conducted with the employees themselves, the personnel officers and the management. These interviews were linked to behaviour and 'hard' facts such as career results, bonuses, etc. Although performance is difficult to measure, the results of this survey did indicate that any fall-off in performance in fact has scarcely if anything to do with age. Deterioration in performance was due more to indirect prospects such as lack of prospects, no further participation in training, less attention from management.

Based on the results of this survey a brochure was written by personnel with the aim of changing the image of the older employee in the organisation. Also contained in the brochure was list of the measures of importance to a more age-aware personnel policy. The brochure was distributed to the (personnel) management of all departments falling under the Ministry of Internal Affairs.

## **II ERGONOMICS, JOB DESIGN AND PREVENTION**

### **ERGONOMIC MEASURES/IMPROVING WORKING CONDITIONS**

**4.1**

#### **116. SBB Services Group (Belgium)**

**2.3, 3.8**

This is a services organization. For older employees who are having difficulties in coping in their job, an attempt is made to find a change of responsibilities. For example when it is noticed that someone is finding the processing files too stressful, they can act as a mentor for new recruits. In some cases a change of jobs is considered if agreement can be reached between the personnel department, the employee involved and the employee's new manager.

SBB Services Group is a services organization in Louvain. It provides various services to companies and entrepreneurs. For example it contains an accountants office, a social secretariat, a wages administration for employees, and a personnel advisory bureau. It employs 260 men and 180 women. Approximately 20 per cent of staff work part-time.

The organization went through a vigorous period of growth in the 1980s. At that time mainly recent graduates were recruited. This means that the number of older employees is quite small: only 20 people are aged 55 and above. The organization has a flat structure so that the level directly below top management has a good overview of the operations of employees at the

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workplace. In addition each year a round-up is organized of the performance of all members of staff. That is also the point at which performance appraisal interviews are conducted. These decide firstly who deserves bonuses and whether everyone is on the right salary scale. The company, which is part of the Boerenbond group, is proud of being able to guarantee stable employment to its employees.

So what happens to older employees who are unable to keep up? In the first place an attempt is made to find a change of responsibilities. For example when it is noticed that someone undergoes too much stress in processing files, they can act as a mentor for new recruits. In some cases change of jobs is considered if an agreement can be reached on this between the personnel service, the employee involved and the employee's new manager. In general terms the company tries as far as possible to deploy everyone in the most suitable place. It is possible to speak of a systematic policy with regard to older employees. These solutions have a very individual complexion.

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### **117. Campine NV (Belgium)**

This company is involved in the recycling of car batteries and the production of anti-monoxide and polymers. It has administered a survey on the expectations of older employees. The conclusions drawn from this were that in future three areas will need to be given priority: part-time work, ergonomics and the transfer of know-how.

Campine (Beersel) is a non-ferrous metal company whose operations are concentrated on three areas: recycling car batteries, the production of anti-monoxide and the production of polymers. Two years ago there was a restructuring in the company, allowing natural wastage of many older employees who retired with a bridging pension. At the moment there are still some 25 employees aged 45 and above. In total 165 people are employed, including 15 women. The greater majority work full-time.

In order to allow older employees to work in as well an adapted situation as possible, they recently answered a questionnaire on their expectations. The conclusions drawn from this were that in future three areas will need to be given priority: part-time work, ergonomics and the transfer of know-how. Part-time work is complicated, however, since the government attitude to pension schemes is very inflexible. For this reason it was decided to concentrate in the first instance on ergonomics for older staff.

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### **118. Ruoka-Saarioinen Oy (Finland)**

This large family food production company has been hit by the high cost of early disability pensions. In collaboration with public and private insurance institutions the company has invested in a project aimed at adding one or two years to an employee's working life with the company. The project has had a beneficial impact on both physical and mental working capacity.

Ruoka-Saarioinen Oy is a privately owned family food production company, founded in 1954. There are 770 employees: 545 women and 225 men. One third of employees are over 45 years old, and 25 employees are older than 60. In 1996 the company began an experiment of flexible working involving 15 employees.

In the past few years there have not been many new recruitments. The staff diminished by 230 workers between 1989 and 1995. Seven of them were old age retirees, about 30 disability pension retirees and the rest were given notice. On the one hand, the early disability pension, launched in 1986, enabled workers to exit the work force while, on the other hand, there was a labour shortage. Between 1986 and 1994 early disability pensions have cost the company 20 million marks. Because of this and in order to ensure a flow of skilled workers, Ruoka-Saarioinen Oy began to invest in a working capacity project. Enthusiastic cooperation partners have been the Social Insurance Institution and the Eläke Varma insurance company. The aim of the TYKY-project (working capacity project) is to add one or two years to a worker's working life. A six month addition to work life pays back the costs of the project.

The project began with major investigations of the working environment, especially concerned with older workers, to analyse the arduous nature of different tasks and the danger associated with work at the factory. The whole staff, however, completed the questionnaire on working atmosphere in 1989 and 1991. The aim was to study the effects of cooperation, management and to inform action. The personal health examination was also an important part of the project, and the first poll covered 58 workers aged 50-55 years in a food factory and in a slaughterhouse. Later also workers in the age group 45-49 and workers over 55 years took part in these examinations. The majority of them were women. The health examination includes tests of condition, laboratory experiments, physiotherapist's tests, doctors' search and an interview by an occupational health care nurse.

According to the large amount of information yielded from these investigations, the working environment at Ruoka-Saarioinen Oy has improved. The physical working environment has improved, for example, by the purchase of new working equipment. Ergonomic improvements have enabled better working postures. The workers have personal pause exercises, fitness programmes and, for example, losing weight has become popular. The guidance of work is renewed and it is available for the older workers, when they face new tasks. Training in small groups is a good example of how information and cooperation have improved at the company.

In addition to workers' own interests in maintaining their condition at leisure time, rehabilitation at the rehabilitation institutions is also increased. Over 100 workers have been to these institutions. To apply a large project of this kind at any company means many people taking responsibility for it. The company's management, different personal groups and the occupational health officers have made this project possible.

Although the project has cost a large amount, it is paying the money back. The result of the project is that both physical and mental working capacity have improved. The sickness absences are

reduced and working satisfaction is improved. Workers think that action to maintain working capacity is important and they are pleased about being taken into consideration and being listened to. As the personal manager of the company says, by this project the management has shown, especially older workers that they are important because of their skills and positive working attitudes.

## **4.2 ORGANISATION OF TASKS**

### **7.1 119. Rhine Estuary Waste Processing (AVR): job change and adaptation (Netherlands)**

This waste processing company has identified a need to develop a policy on older staff with the aim of allowing staff to contribute their knowledge and experience for as long as possible. AVR is focusing in the first instance on shift workers aged 50 and over. Irrespective of the age of the employee, with the aim of reducing or preventing health problems, there is an attempt, if necessary and desirable, to adapt the job of the employee concerned either temporarily or permanently through re-training leading to a job change.

The AVR is a waste processing company with approximately 500 employees. The average age of staff is approximately 40: quite a high average for a production company where many employees perform operational work on a shift system, especially as employees often encounter health problems as they grow older. The figures show that the number of employees aged 50 and over is growing annually. This fact is one of the reasons why at the end of 1992 attention was called in a discussion document to the need to develop a policy on older staff with the aim of allowing staff to contribute their knowledge and experience for as long as possible. The AVR is focusing in the first instance on shift workers aged 50 and above. It involves mainly adjustments for individual employees and not so much generally applicable schemes. Thus although policy on older staff or age-aware personnel policy in this organisation has not yet been strategically formulated, there is an awareness of the problems which can arise if there is a mismatch between workload and capacity. Irrespective of the age of the employee, with the aim of reducing or preventing health problems there is an attempt, if necessary and desirable, to adapt the job of the employee concerned either temporarily or structurally. Implementation is in the hands of the transfer committee comprising heads of department, the company doctor and the head of Personnel, Education and Training.

As in many other organisations such a policy is often hampered by the limited job differentiation in the production area, which makes job rotation to different/lighter tasks scarcely feasible. As one solution to this problem AVR has opted to have work that was previously 'contracted out' done by its own organisation again. It emerged from an investigation of this possibility that this was perfectly possible with some six activities. These included drivers and (external) messenger services. These jobs were subsequently used for employees who because of their age, etc, had problems with shift work. There was no loss of earnings for the employee involved, as compensation was paid for the shift work bonus.



Besides this solution through job structure, solutions are also sought in the qualification of individual employees. A concrete example of this concerns an employee in the weighbridge control box who was unable to perform his job there because of knee problems and as a result was out of circulation for over a year. Thanks to a refresher course in the use of computers it was possible to transfer him from the weighbridge control box.

Although this was not the intention this approach also proved financially beneficial to the organisation: on the one hand due to lower costs relating to the contracting out of work, on the other through the reduction of unwanted staff wastage. The intangible benefits are clear from the satisfaction of employees with their new/adapted jobs. Or as one of the employees puts it, 'I whistle all the way to work and all the way home.'

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## **MIX OF YOUNGER AND OLDER WORKERS**

**4.3**

### **120. SHELL Company (Greece)**

This organisation has been involved in a major programme of redundancies. However, it has recognised the need to maintain an age balance in the company and to base redundancies on value to the company rather than age. There is a deliberate policy of avoiding the loss of older workers' know-how. In addition older workers are not discriminated against in terms of the provision of training. On certain occasions workers who have retired are brought back on temporary contracts.

The SHELL company (Hellas) has been operating for the past 70 years in Greece and currently employees 400 people. It is a Dutch company of private shareholders. It is based in the Attica region. It ranks as 11th amongst the 200 most profitable Greek companies with profits of 5,565 million drachmas.

As a consequence of events in Europe and USA there has been a serious need to cut back on staff. This has been the social role of the firm - on how to deal with it over and beyond the requirements of the law. The firm introduced a discretionary system for redundancy. Clearly when pushing out people over the age of 50 years the company is aware that there are young, available graduates below and it would be against the tide not to want these. However there needs to be a 'balance'. No responsible administration would make redundant all older people. It wants some to stay. Thus when carrying out downsizing some of it is carried out on an age basis but this is not completely the case. They try to keep knowledge within the company and not carry out a pogrom on an age basis. The company examines the level of workers' knowledge before encouraging or discouraging them from leaving - they don't want to lose the know-how that older workers have.

As far as training is concerned this is carried out according to needs for updating. Thus computerisation meant training and older people were not excluded. It is true that someone over 55 years has to make a bigger effort.

Flexible work : periodically the company does use someone who has left on pension for a specific contract e.g. for a month, but this is not done on a regular basis. In any case the company has a good working environment and design which is of benefit to all workers.

## 4.4 AGE RELATED HEALTH MEASURES

### 4.1 121. Safematic Oy (Finland)

This medium size company has made a substantial investment in occupational health care and action to maintain working capacity. This includes a range of different ergonomic improvements and rehabilitation. The company justifies this investment on economic grounds, for example a low sickness absetee rate and customer satisfaction.

Safematic Oy is a Finnish company which produces lubrication systems and mechanical shaft packings. The company was founded in 1972 and it employs 195 people. The workforce consists of 161 men and 34 women. One quarter of the employees are over 45 years of age. The number of employees has almost doubled in three years. Age has not been the criteria for recruitments in Safematic; everybody has had equal access to the available jobs.

Last year Safematic spent 3000 marks per worker on occupational health care and action to maintain working capacity. The idea behind the investment in workers is that when they are feeling well both mentally and physically, it effects not only the workers themselves but also the customers' satisfaction. In 1990, Safematic formed its own occupational health care station, the target was to take care of workers' health. Occupational health care action changed in 1993, when the company started systematical action to improve working capacity and well-being of employees.

The aim of TYKY-action is to cover all employees and offer them various encouragements. The basic functions of occupational health care are health examinations, work place settlements and all-inclusive health care. They form the basis for TYKY-action at the work place. Safematic Oy has many different kinds of projects, which are not especially directed to older workers, but cover all employees. Projects are planned by the management and workers in a panel and the health care nurse puts them into practice.

In 1993 Safematic started the HEP-project (improving employees' quality of life). The project includes both continuous and short-term programmes. The company helps workers to quit smoking by providing them with nicotine plasters. It also supports many kinds of sports activities, such as swimming, badminton, gym and jogging. There is also gym training guided by a physiotherapist. At the moment there is a employees' support group, where they can discuss their pressures and problems.

The TYKY-project includes ergonomic improvements, secretaries' 'neck repair', excercises and mental training. Rehabilitation is provided for workers whose working capacity is in danger of



declining. The impacts and outcomes of these projects are tested by measuring effects with special indices. At the moment none of the employees are seeking retirement, the sickness absences are low, only 2 per cent, and Safematic is known for its advanced attitudes and the well-being of its workers.

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## **122. Hazenberg Construction Company: job adaptation and social-medical supervision (Netherlands)**

**2.3, 4.1,  
4.3, 4.6**

Through job adaptation and social-medical supervision this medium-sized company tries to anticipate potential medical problems, particularly those affecting mobility. This includes periodic health checks. The company doctor advises both employee and employer on a sensible combination of load and capacity. Forms of adaptation include: a switch from carpentry work to supervisory positions; mentoring of younger, less experienced operational staff in less arduous renovation projects; putting a younger employee to work with an older one as, with the heavy work being carried out by the younger person and the older worker providing training; and adjustment in the pace of working.

Bouwbedrijf Hazenberg BV is a medium-sized construction company and is an independent 'subsidiary' of TBI Holdings BV. Hazenberg employs 100 staff, with an average age of 37. The company tries to hold on to younger staff. Although an ageing workforce is not yet an acute problem in this company, because the influx of young construction workers is sufficient, the company is fully aware of the need for a more age-aware personnel policy. The long periods of service, the attitude of staff and the awareness that they are important to the company with their knowledge and experience are reasons to concentrate on a sensible combination of workload and capacity. Social motivation also plays a part. In addition most staff are in the 46-50 age category, although the work that building workers have to do is arduous. Through job adaptation and social-medical supervision the company tries to deal with and where possible prevent medical ailments, particularly those affecting mobility.

The social-medical supervision includes, for example, periodic health checks and also in cooperation with the company doctor individual absenteeism counselling for staff. The company doctor advises both employee and employer on a sensible combination of load and capacity. Forms of adaptation include:

- \* replacement of heavy carpentry by a supervisory position as a working foreman;
- \* cooperation with younger, less experienced operational staff in less arduous renovation projects. The older employee occupies a kind of mentor position;
- \* the company also achieves a young/old mix, by putting a younger employee with an older one as a 'mate'. The heavy carrying is done by the younger person and the older one provides some training;

- \* adjustment of working hours is an organisational problem. What is possible is a reduction in work rate. The member of staff works a full eight hours but for example 'goes at his own pace'.

## 4.5 EXCLUSION FROM SHIFT WORK/NIGHT WORK

### 123. Plavina & Cie (Belgium)

In this chemical company at the request of the older employee or on the advice of a doctor, it is possible to be transferred from the production department to a division where only day jobs are available.

Plavina & Cie (Oudenarde) operates in the chemicals industry. Specifically, PVC is processed into flexible plastic film for the construction sector (protective materials) and the printing sector (stickers). The company employs 230 staff. The vast majority are men and are employed full-time. There are 140 manual employees and 90 white-collar staff.

The whole production system is constructed on the three-shift system. People change shifts on a weekly basis (morning, afternoon and night). There is also a weekend shift working 12 hours per shift.

At the request of the older employee or on the advice of a doctor it is possible to be transferred from the production system to a division where only day jobs are available. Up to now approximately 20 manual workers have taken this step. For example, a worker with only one kidney was given a warehouse job three years before his bridging pension involving products which he had manufactured previously.

Obviously many factors are involved in such a transfer. For example, it must be borne in mind in any transfer whether the balance in the production division will be maintained when an older employee leaves, whether there is a job vacant in day work, or whether the person in question is competent enough for this job.

### 124. Injextru Plastics NV (Belgium)

In this plastics company care is taken that workers aged 50 and above are no longer forced to work nights. Through a reduction in working hours employees have also obtained 12 additional days' holiday. Those who so wish, may use these holidays when they would normally be working nights. In this policy preference is given to older employees.

Injextru Plastics (Tielt) is a limited company. The company, which acts as a supplier, manufactures plastic mouldings and all kinds of extruded materials. It employs 68 staff, including 14 white-collar staff. Of the 52 manual workers, only 8 are women. A three-shift system is worked from Monday morning to Saturday morning (120 hours per week).



Care is taken that workers aged 50 and above are no longer forced to work nights. In the past this group often complained of a lack of sleep and that when on night work they had problems with tiredness at work. Four workers have been able to take advantage of this option before taking a bridging pension.

Through a reduction in working hours company employees obtained 12 additional days' holiday. Those who so wish, may use these 'holidays' when they would normally be working nights. In this express preference is given to older employees. This enables them to miss out certain night shifts.

### **III CHANGING ATTITUDES WITHIN ORGANISATIONS**

#### **PROGRAMMES TO CHANGE ATTITUDES TOWARDS OLDER WORKERS 5.2**

##### **125. Volvo Penta - Individualised Development plans (Sweden) 2.1**

This major Swedish company has engaged on a programme to change the attitudes of its employees towards internal mobility. The initiative includes the allocation of money to individuals for personal development programmes.

'Forum 50+' have appointed Volvo Penta 'Firm of the year'. This firm has developed an interesting approach in handling the dilemmas of an aging workforce.

Between 1991-93 the company laid off a substantial number of employees. The company adhered rather strictly to LAS (i.e. the employment protection law) and as a result most of the recently employed persons, as well as the younger employees were laid off. After this painful process, very few employees below 25 years remained, and the median age of the personnel rose to 47. Not only were many laid off, but several also had to change jobs within the company, finding themselves in new groups with which they had to work.

Thus the company faced a difficult situation - an ageing staff together with major ongoing changes in their work organisation (introducing team work, project orientation etc). There were strong pressures on the staff to adapt to new kinds of demands in terms of engagement, new techniques, colleagues etc. The 40 plus group had to be engaged in this process of change, according to the managers. Therefore the company decided that 55 persons every half year, 220 persons in all, should be involved in a major personal development programme. Every person gets 20.000 SEK (i.e. £950) as an individual sum to use for development (to finance education, buy a PC and so on) The development program spans half a year and includes all employees, workers as well as white collar employees. The aim is not primarily to add new technical competence to the employees, but make them accept changes in their work. The focus is on changing the attitudes of the employees to internal mobility in the company.

This kind of ‘mentality change’ has been part of personnel development programmes in several large Swedish firms, programmes directed specifically to employees above 40 years (including the 55-64 age group).

The personnel manager at Volvo Penta does not regard it as possible to retain everyone among the personnel in the company. Not everyone are seen to be willing to look into their whole situation (including physical training). Furthermore, such a project is dependent on the economic situation of the company. The earlier alternatives in this company were early retirement (paid by the company and the occupational pension scheme) and a redundancy project where those that were deemed as redundant were assembled in one section of the company. This way of weeding out employees was painful for all involved.

This company has in a second phase of restructuring chosen to devote a substantial amount of effort in developing an individualised education and training programme, a programme that in effect also expects quite an effort on part of the employees.

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## 126. Temporary Staff Agencies (Belgium)

The temporary sector has distinguished highly skilled and the low skilled older workers as requiring a special approach. As far as the former is concerned one agency has run a campaign targeting its own staff and industry with the message that older people have a package of professional and general experience and are often very flexible. Proposals considered as feasible for the lower skilled are: i) a sensitizing campaign to alert this group to the opportunities offered by temporary work; ii) training programmes to increase the flexibility of this group; iii) making the home-care sector accessible financially; iv) assigning a separate consultant to work with older people.

There is only a limited number of employees in the 45-plus age-bracket in temporary staff agencies. Both in the private sector and the government sector of temporary work those aged 45 and above constitute 5 per cent of the total number of temporary staff. These older employees are generally found in the more qualified segments of temp work where experience and qualifications are of decisive importance (eg bookkeeping, personnel work, engineering, etc). Moreover, the image of the temporary sector is not conducive to attracting older job seekers. Temporary staff are still too often regarded as younger workers such as school-leavers who enter the job circuit through temporary work.

Consequently the temporary sector distinguishes two target groups among those aged 45 and above, which require a separate approach: firstly for the more highly skilled segment (eg management staff) in the labour market who do not go to a temporary agency of their own accord, and secondly for the large group of older employees with lower skill levels who are employable only in temporary work because they no longer possess the initiative to apply for work voluntarily.



As far as the segment of management staff aged 45 and above is concerned, Gregg has set up a project designed to run a campaign targeting its own staff, industry and older management staff with the message that those aged 45-plus have a package of professional and general experience and are often very flexible. Companies should be encouraged to deploy the 45-plus age group as 'coaches' for younger employees.

Various proposals have been formulated for the group of less qualified older employees. One striking feature was the unanimously negative reaction to setting up a specific temp agency for those aged 45 and above within the company. This would have had too stigmatizing an effect on this target group and thus been too counter-productive. The sector believes rather in the 'carrying along effect' or the 'slipstream theory': if only 'less good staff' are on offer, one can never build a customer relationship.

The proposals considered as feasible are:

- the development of a sensitizing campaign to allow this target group become acquainted with the opportunities offered by a temporary agency and to dismiss prejudices relating to 'interim work';
- the initiation of training and retraining operations, provided there is government subsidy, to allow this group to be flexible, as is often the case with younger groups in the labour market. For the older group of employees the attitude would be the most important problem in re-entering today's flexible labour markets;
- making the 'home-care sector' accessible financially (child minding, care for the elderly, home helps) for the temporary formula;
- assigning a separate consultant (aged 45 or above) within the temporary agency to deal with people of his own age who could make an additional analysis with older job seekers of the way in which they have applied for and why they have not succeeded in finding employment up till now.

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## **OTHER AGE AWARENESS PROGRAMMES**

**5.3**

### **127. Veterinary Care in Boxtel: the survey (Netherlands)**

**7.3**

Management in this organisation believe that a more strategic age-aware personnel policy must be developed. As a first step a questionnaire has been sent out to all employees asking for their opinion on the quality of the workplace, working conditions, motivation and mobility. Employees were also asked for their views on the relationship between age and work. The results of the survey show that levels of stress are high among those aged 45 and over.

Nationally the Netherlands Veterinary Care Organisation still consists of five branches, with a total workforce of approximately 700. After the reorganisation, which was begun in 1993, there

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will be three branches left (Deventer, Drachten and Boxtel). The freeze on staff and investment announced at the end of January 1993 was the beginning of a radical process intended to lead to an actual reorganisation of the Netherlands Veterinary Service. The size of the staff at Boxtel is 200, with an average age of approximately 37. Although the recruitment of younger, qualified personnel is not expected to present problems in future, it is not an imaginary fear that horizontal mobility will begin to stagnate. People will stay in the organisation for longer and hence grow older in it. For management and particularly personnel management this is a reason to pay more attention the combination of 'work and growing older'. The opinion is that a more strategic age-aware personnel policy must be developed. As a first step a questionnaire has been sent out to all employees asking for their opinion on the quality of the workplace, working conditions, motivation and mobility. Employees were also asked for their views on the relationship between age and work. The results of this survey include:

- \* adaptation of workplace for over-45s considered desirable by 34.7 per cent of staff. 35.7 per cent indicated physical adaptations and 50 per cent adjustment in performance pressure;
- \* strikingly, 71.4 per cent opt for a policy of demotion;
- \* 22.2 per cent take the view that older people are less productive, while 5.6 per cent indicated that they felt older people were less motivated;
- \* given a choice of retirement age, 52.3 per cent opt for an age between 55 and 58 and 37.5 per cent for an age between 59 and 62;
- \* 3.1 per cent opted for continuing to work beyond the age of 65. If there were an option of continuing to work longer but working fewer hours, 51.6 per cent would not take it;
- \* for 50.4 per cent the decisive factor in deciding retirement age is income and for 25.2 per cent the state of health. The importance of income in the decision whether or not to take advantage of early retirement is significant for 60.9 per cent and decisive for over 21 per cent.

The results of the survey show that the physical and mental pressure in the work situation is felt to be high by the over- 45s and that adaptation of the workplace/work pressure is considered very desirable by respondents. In addition there is a clear connection between the desire to retire early and the level of income. Given present trends in early retirement schemes this may mean that older people will stay in the organisation for longer.

At present a preventative policy is pursued on an occasional basis if there is a danger of discrepancy between workload and capacity in individual cases. Such cases are detected by means of the performance interview and the sickness policy. As regards recruitment policy the focus is already on the suitability of the person and not on age. Based on the results of the survey there will be specifically targeted work on a more strategic age-aware personnel policy during and after the reorganisation.



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### 128. Child Care Services (Sweden)

This initiative focuses on mature women working in the child care services run by the Swedish city of Sundsvall. Discussion groups have been organised as a way of boosting the confidence and improving the image of ageing workers.

During the last 25-30 years the child care facilities organised by Local authorities have grown rapidly. These services employ large numbers of women, both those who are trained in university colleges (pre-school teachers) and those who are trained on high school level (childminders). Today many women in this sector are approaching their retirement and feeling the effects of their work. Can they stay in their job until they reach their retirement age (63-65 years)?

The Social Services in the City of Sundsvall, a major city in mid-northern Sweden, organized a series of work environment projects in conjunction with the Working Life Fund. One of the projects was devoted to the problems of getting older in child care work. The point of this project was not to hire more older workers or to train them in the traditional sense, e.g. through formal education and lecture. The project took the form of discussion groups for those above 50 years.

The discussions groups were led by 22 coordinators chosen from the participants and 266 women participated in the project. In the discussion groups the experiences of the older employees were taken up. They discussed the specific values and contributions that experience could bring to the work groups in the day care centres and to the children. The importance of tacit knowledge was stressed, as was the role of accumulated experience, and the role of the older employees as a kind of 'master' in relation to the younger personnel.

The effects of this programme on the exit flows has not been evaluated by the city, but the evaluation through questionnaires that took place seems to indicate that a clear majority of the older workforce have found the positive role and image of the older workforces given by the employer as something positive.

The collective attitudes of the older workforce is often one of the factors that accelerate early exit. Management can influence this self-evaluation by their recruitment and training policies, but also through programmes of horizontal confidence-building efforts, especially if this kind of programme is supported by efforts to reorganise work, or at least not by stepping up the pressure on the older workforce.





## Chapter Five

# Multi-dimensional Examples of Good Practice

This section includes those initiatives which could not be classified according to one main type of good practice because they covered several different sorts of good practice or because they represented an integrated approach to age and employment.

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### 129. Furniture Manufacturer (France)

**1.3, 2.2,  
4.1, 6.2**

This company specialises in the manufacture of self-assembly furniture. It endeavours to anticipate and manage the staff age pyramid and training requirements and has resolved to abolish full early retirement. The company specifically recruits staff aged over 50. The company's aim is to train all staff. There have been efforts to improve working conditions through the modernization of equipment and the introduction of computer controlled machinery in order to improve hygiene and safety and to ease work tasks such as materials handling in order to prevent premature physical deterioration among staff.

'FurniCo' is a large company specialising in the manufacture of self-assembly furniture. It is a private, family-owned business situated in a rural area which also has a high level of unemployment following the collapse of the local iron and steel industry. It employs over 1,000 people, principally men (over 65 per cent), and manual workers (36 per cent) mostly with poor qualifications; 16 per cent of staff are aged over 50. Temporary workers are also used.

Staff numbers have declined slightly in the course of the last ten years. A period of economic difficulty in the mid-1980s resulted in redundancy schemes, but the company has since made a steady and rapid recovery. It has endeavoured for some years to anticipate and manage the staff

age pyramid and training requirements. 'FurniCo' has resolved to abolish full early retirement in view of the cost drawbacks of this age-related measure, and in order to retain latitude for manoeuvre should any problems arise.

The company specifically recruits staff aged over 50 in order to fill gaps in its age pyramid. Recruitment of this kind is regarded by management as a means of achieving a more flexible workforce, and limiting the company's commitments without staff perceiving their situation as precarious. Recruitment is nevertheless inhibited, in the management's view, by two obstacles: the low number of people in this age range seeking to resume a working life; and limitations of medical fitness to perform production tasks which remain physically very arduous.

To accomplish the aims of the staff training programme, an unprecedented training campaign was launched several years ago. The ultimate objective is to train all staff to a level equivalent to a Trade Diploma. Training is available to all provided they demonstrate enthusiasm and motivation. The management have, however, noted widespread resistance amongst the oldest staff. Following a determined campaign by line managers, and the successes achieved by younger staff, this resistance is beginning to yield.

Efforts to improve working conditions have continued for several years, in an endeavour to improve hygiene and safety (noise, dust) and to ease work tasks such as materials handling. The aim is to prevent excessive physical deterioration amongst staff in their latter years. Physical incapacity is that much harder for the company to deal with because the scope for transferring staff to less demanding tasks is severely limited. Working conditions are being improved by the modernization of equipment and the introduction of computer controlled machinery.

For the present, it is still the youngest employees who operate the new machines. Furthermore, little effort is being made to improve working hours. Far fewer staff work part time than ten years ago. Management is beginning to consider phased early retirement, though it does not plan to introduce it at present.

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**2.1, 2.2,  
3.8, 4.2,  
6.2**     **130. Motor Manufacturer (France)**

This is a private car manufacturing company. It offers enhanced terms for phased early retirement although full early retirement remains more popular. Skill shortages, particularly among older workers, and the prospect of an ageing workforce has led the company to improve working conditions. Greater attention and innovation has been applied to the design of workstations and to the selection of production equipment purchased. Considerable efforts have been devoted to training the whole of the workforce including older workers.

'CarCo' is a large, private car construction company. It employs over 60,000 people, of whom 20 per cent are more than 50 years old. The works unit actually studied is located in an urban area



and employs over 8,000 people, mostly male workers, including a high proportion of foreigners (40 per cent) and people aged over 50 years (30 per cent). Extensive use is made of temporary labour.

The number of employees has fallen steadily over the last ten years as a result of economic difficulties and higher productivity. The cutbacks were achieved through redundancy programmes which made use of age-related measures, natural wastage, and leaving incentives in preference to forced redundancy. The resultant increase in the average age of staff remained a secondary consideration compared to the crisis confronting the company. Because it was statutorily impossible to carry out redundancy programmes and recruitment activity simultaneously, the average age of staff continued to rise. This has been a matter of concern for senior management for some years, and is thought to be an obstacle to further increases in productivity. Achieving a more youthful age pyramid has become a matter of priority.

Since 1992, senior management has offered enhanced terms for phased early retirement. Yet full early retirement remains the option taken in the bulk of cases. Phased early retirement has actually enjoyed little success. It was very badly received by salaried staff right from the outset: they regarded it as a poor substitute for full early retirement, which they practically saw as a right. The increased use of phased early retirement has resulted from the adoption by management of a new line, presenting it as a compulsory step towards the subsequent granting of early retirement under the terms of the redundancy programme. Implementation of phased early retirement nevertheless raises specific work organization problems which result from the changeover to part-time working, adjustment by the employee if part-time working is on a weekly basis, and a decline in staff motivation.

Economic difficulties encountered by the company during the 1980s led it to outsource a number of activities, so that jobs on the periphery of the production line were eliminated. Skill shortages, particularly amongst older workers, and the prospect of an ageing workforce led the company to improve working conditions. Within the technical and financial constraints obtaining, greater attention and innovation was applied to the design of workstations and to the selection of production equipment purchased. However, this willingness to mitigate the discomforts of work tasks does not question the logic of the production-line system. Given that there will always be a certain number of arduous tasks, recruitment of young staff offers the prospect of gradually transferring such posts from older to younger people.

In response to the recruitment of 400 young people, a training scheme was established to promote integration into work teams, maintain work team cohesion, and facilitate the transfer of specific types of expertise. The success of the scheme has been partial: it is hard to find people with the ability to document and communicate expertise (many foreign workers have a poor command of the French language), the mentor's role has turned out to be of fairly short duration, and the choice of mentor has been determined by specialism rather than by age (older staff have tended to be less well qualified).

Finally, considerable efforts have been devoted since the 1980s to training the whole of the workforce, including the eldest. Employees over 55 years of age are, however, less responsive to training. Their lack of motivation is largely due to the retirement terms they expect to enjoy at some point during the 15 or so years after age 55.

**2.1, 2.2, 3.8, 4.2, 6.2** **131. Chemical Company (France)**

This manufacturing company has been developing the use of phased early retirement. This has been found to create work scheduling difficulties and employees regard it as a poor alternative to full early retirement. Efforts have been made to redeploy older workers with physical limitations within the company. Skill levels are raised by adding several mature staff to work teams. A substantial training drive is under way although staff aged over 55 years appear less interested.

The Chemical Company is a very large business specialising in fine chemical manufacture. It forms part of a privately owned group, and employs some 13,000 people. The works unit studied, located in an urban area, is the company's oldest and largest, having 900 staff. Most employees are male manual workers. An unusual feature of the unit is that it operates with a continuous block of employees aged from 40 to 59 years and who constitute three quarters of the workforce.

Staff numbers were very dramatically reduced over the last fifteen years, two savage cutbacks occurring in the mid-80s and early 90s. The reductions were unavoidable for two reasons: the implementation of improvements to productivity, and the need to bring the company back into profit. From 1975 onwards, early retirement was the preferred instrument for dealing with surplus staff since it caused the least social distress and was readily accepted by employees.

From 1986 onwards the company has been developing the use of phased early retirement, the new scheme introduced by government. This scheme avoids the loss of experienced staff which occurs with full early retirement, and also the abrupt replacement of staff since it permits simultaneous recruitment. It also costs the company less because no redundancy occurs (redundancy payments are very costly because of the considerable length of service attained by staff). Phased early retirement was reintroduced in 1987-88 and again in 1993-95, and management confirmed its resolve not to return to full early retirement. Phased early retirement nevertheless creates work scheduling difficulties consequent upon the transition to part-time working and the loss of motivation this causes. Some groups of middle managers are particularly affected in this respect. Discussion took place amongst senior management and middle management regarding the impact of the scheme upon the company. Senior management wanted to use phased early retirement as a means of extending part-time working. Employees have reservations about phased early retirement, and regard it as a poor alternative to the former full early retirement scheme.

Manpower reductions have been accompanied by a reorganization of work making individuals available for a wider range of duties. Efforts have been made to redeploy workers with physical limitations within the company, in most cases on the basis of age. Apart from redeployments of



this nature, there are no changes in the duties allocated to older staff. Skill levels are raised by adding several mature staff to work teams.

A substantial training drive is under way, and extended courses leading to qualifications are favoured. Despite the stress laid upon the voluntary nature of such training and upon matching them to each employee's needs and abilities, staff over 55 years appear less interested in full training courses because they tend to assess them in terms of cost and return on investment.

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### **132. Petroleum Company (France)**

**2.2, 2.4,  
3.1, 3.8,  
4.1, 6.2**

This organisation specialises in the refining and distribution of petroleum products. Management believe that early retirement has a harmful effect on staff motivation and are keen to retain the skills of older staff. An early retirement scheme has been withdrawn and replaced by a phased early retirement scheme. The company is also attempting to increase the flexibility of the workforce in order to make it more responsive to change. For example, regular career review meetings, targeted particularly at older workers, provide employees with an opportunity to take an active part in the management of his/her career. Efforts are also made to retrain those whose skills are outdated, especially older staff, and to transfer them to less arduous tasks.

'PetrolCo' is an international group specialising in the refining and distribution of petroleum products. It is involved in four business sectors: exploration for petroleum and manufacture of petroleum products; refining and distribution; rubber technology; and rubber conversion.

The petroleum industry is inherently capital intensive. The workforce is therefore relatively small in comparison with other large industrial groups, yet highly trained and specialized. Of the 2,304 employees in the French company, managerial staff account for 65.5 per cent of all staff, whilst employees account for only 25 per cent, and clerical and other staff for just 9.5 per cent. Unskilled labour is employed for the most part only in the conversion industries, which are characterized by a strong corporate culture, and where major redundancy schemes occurred during the 1980s involving very substantial use of full early retirement subsidized by the National Employment Fund. The predominantly male workforce (71.8 per cent) is rising in age, consisting of manual workers of whom 25 per cent are above 50 years and 38 per cent above 40 years of age. Staff turnover is low (26 per cent of the workforce have served for more than 20 years, 46 per cent for between 10 and 20 years, and 28 per cent for less than 10 years). Only 2 per cent of staff are on short-term contracts.

The rising age of the workforce has become a major concern for the company. During the 1980s, the company initiated a large number of early retirements as part of redundancy programmes introduced in response to economic problems and the need to concentrate on core businesses. Because recruitment is not permitted in parallel with redundancy schemes, the workforce has risen in age. Since then the company appears to have given greater priority to rebalancing its age

pyramid. From 1990 onwards, 'PetrolCo' resolved to recruit only people in the age group 25 to 35 years, and thus acquire a younger workforce. People above this age range are occasionally recruited, but only in the case of people with exceptional skills for highly specialized posts.

'PetrolCo' has also learned the lesson that early retirement from age 55 onwards has a harmful effect on staff motivation. The objective from now on is to maintain and exploit the skills of older staff and to motivate those in their early fifties who become demotivated at an early stage in anticipation of early retirement at 55 or 57 years of age.

Two types of response were then considered: *ad hoc* responses and planned responses.

Ad hoc responses involved people aged 50 years and over. The company decided not to dismiss staff at 50 years of age and not to retire staff fully before the required age. All staff will be retained in the company's service until the statutory age for retirement on full pension. However, in order to deal with difficulties linked to the inevitable rise in the number of staff over 50, phased early retirement was introduced. From the management's point of view, phased early retirement is the 'Trojan horse' which will enable them to impose a restructuring of labour. Their true desire is for phased early retirement to become the established procedure, a permanent instrument of management rather than a means for dealing with temporary difficulties.

Planned responses are applied through preventive policies for dealing with ageing, and seek to combat cultural and professional inflexibility. The company has come to realize that over-rigid labour management - i.e. that which endeavours to maintain staff in the same trade and the same post for years on end - does not make provision for modernization and technological progress. The principle is therefore to develop a more flexible workforce which can be more readily adapted to change.

'PetrolCo' have thus been developing a variety of measures to take account of the growing importance of job mobility, which necessitates the acquisition of new working skills to cope with changes in craft skills, technology, and the marketplace. Human resource planning will henceforth be indispensable for anticipating technological developments, changes in machinery, the emergence and decline of craft skills, and preparing staff, particularly older employees, to cope with them. The company has, for instance, prepared staff replacement budgets, and conducts regular job reviews. Regular 'career meetings' are held to provide each employee with an opportunity to take an active part in the management of his/her working life. These meetings consist of a personal assessment followed by a more detailed interview with a company manager, and are aimed at staff of 45 or so years of age. 'PetrolCo' believe that carrying out a career assessment after age 50 years is too late. The employee drafts a plan, and this is then compared with the company's objectives. Lastly, the company encourages an approach to outside organisations. On the one hand it forms part of a gangway association which takes responsibility for temporarily detaching personnel to small companies. This measure is classed as ongoing



training and enables staff to perform many different jobs. On the other hand, the company facilitates the implementation of personnel projects by maintaining the right to return to the company within a limited period, in a way which yields a positive turnover.

This combination of measures necessitates an active training policy, and in fact 4 per cent to 5 per cent of the staff overhead is currently spent on training. Training in technical skills at the workstation accounts for the bulk of investment in training (65 per cent), followed by training in foreign languages (20 per cent), and general training (15 per cent). All staff are affected by the training policy. There is no rule against training older staff, although there is some reluctance to provide technical training to those over 55 years of age who have always held the same job. On the other hand, a sustained effort is made to retrain those whose skills are falling into disuse, especially older staff, and to transfer them to less arduous tasks.

‘PetrolCo’ is an interesting case, since its current policy towards ageing staff is to keep them in their jobs. The company’s aim is to avoid redundancies and full early retirements prior to retirement on full pension: this represents a reversal of earlier practice. Nevertheless, although a mere 120 people have been so far affected, phased early retirement remains the principal solution contemplated when difficulties are confronted.



### **133. Lift Manufacturer (France)**

**2.2, 2.4,  
2.7, 3.2,  
3.8, 4.1,  
4.3**

This company specializes in the manufacture of lifts and travolators. In 1991 a company agreement was concluded between management and employees’ organizations concerning career development between the ages of 50 and 60 and the opportunity for progressive retirement from work. However, the agreement has now lapsed. An apprenticeship scheme has been set up. A mentor, already given training in teaching techniques, is allocated to each new recruit. If an employee finds their duties too arduous it is possible to transfer from repair work to less demanding maintenance work.

This company specializes in the manufacture of lifts and travolators. Maintenance of customers’ installations accounts for the bulk of the company’s business (approximately two thirds).

‘LiftCo’ employs 5,400 staff, mostly manual workers (60 per cent). 20 per cent of staff are over 50 years old, and currently eight employees are over 60 years. The average age of staff is 39 years. Staff turnover is low. The average length of service is 15.8 years, a sign that most staff join the company with the intention of making their career within it.

In March 1991 a company agreement was concluded between management and all employees’ organizations. The foreword stated that ‘the parties acknowledge the extensive professional experience and depth of expertise accumulated by staff over 55 years of age and agree that there is scope to maintain the professional motivation of this category of staff within the company’.

The principal themes addressed by the agreement concerned career development between age 50 and 60 (provision of training, scope for advancement, transfer of knowledge) and the opportunity for progressive retirement from work (from age 57 onwards, consenting staff enjoy additional leave rising from one day per month to one day per week in the third year). The agreement has now lapsed. On the one hand it did not appear to be welcomed as warmly as expected by employees, and few came forward to take advantage of it. On the other hand, the company's current economic situation weighs heavily against renewal of the agreement.

The average age of personnel in the years ahead will inevitably rise because of the low level of recruitment anticipated. The trend is increasingly towards recruitment from within existing staff. The clerical workforce is being 'slimmed down' and converted to 'production workers' where possible. As to recruitment, the age criterion is applied differentially depending on the function of the new recruit. Forty years of age appears to be a ceiling which is rarely exceeded for jobs of a physically arduous nature. Whilst the management of ageing staff is not currently classified as a major company concern, there is a danger that it will have much more serious consequences in the medium term. Faced with this prospect, the company's management is considering the adoption in future years of a policy for retaining older staff in the company's service, and encouraging careers within the company.

There is a special problem in the area of skill transfer. The maintenance of customers' older plant installations calls for the skills possessed by older staff. An apprenticeship scheme has therefore been set up. A (volunteer) mentor, already given training in teaching techniques, is allocated to each new recruit. Each new recruit thus receives systematic training. The results of the scheme are viewed as highly successful. Every employee receives one training course per annum. In the case of field personnel, this represents 38 hours of training per annum.

No specifically age-related measures are used to ease work-loads, any problems which arise being addressed on their individual merits. If an employee finds his duties too arduous to bear, he may be invited to transfer from repair work to physically less demanding maintenance work. The only effective method for easing working hours is the 'VSD' system, under which staff work Fridays, Saturdays, and Sundays. The company's plant maintenance business obliges it to provide 24-hour coverage. Staff who experience difficulty in connection with unsociable working hours can request easier schedules. Cases are dealt with on their individual merits.

1.2, 2.2,  
2.4, 3.4,  
5.2, 7.1

#### **134. Wilkhahn GmbH - Non-age-specific personnel, career and training policy (Germany)**

In this furniture company older workers are highly valued for their highly developed manual skills. The following measures play a part in ensuring that age barriers are virtually non-existent: integration of older workers, including those whose productivity has been impaired, into new types of production; workplace training including management training; targeted recruitment of older skilled workers and wherever possible, avoidance of early retirement; and measures to protect health and agreements to guarantee earnings of older workers with

health problems. A group working system is used as the framework for training which is provided irrespective of age.

Wilkhahn GmbH & Co. KG is a furniture company which was founded in 1907. Its main site is at Eimbeckhausen, a smallish settlement in a rural part of Lower Saxony. It has an additional production facility in Spain and numerous sales agencies both in and outside Europe. The company specializes in the manufacture of high-quality seating and tables for conference, office and agency use. It currently employs about 550, of whom 360 are male and 190 are female. 80 per cent of the workforce are skilled workers or qualified administrative staff. The average age of the workforce is approximately 43.6 years, almost 20 per cent are 50 years or older. The average length of service is very high at 30 years.

Generally speaking older workers enjoy a high esteem and this is explicitly recognized by the company. In particular the older production workers are highly valued for their practical experience, which is considered of particular importance because the work requires highly developed manual skills. The following measures also play a part in ensuring that older workers are largely integrated in the company and age barriers are almost non-existent:

- integration of older workers, including those whose productivity has been impaired, into new types of production,
- associated workplace training and special training for managerial functions,
- targeted recruitment of older skilled workers from the employment market and wherever possible avoidance of early retirement and
- measures to protect health and agreements to guarantee earnings of older workers with health problems.

At present about 100 employees in the Stores, Purchasing, Dispatch, Scheduling and Production Planning groups of the Logistics Division are covered by the agreement on integrating older workers into the group working system which has been introduced for production processes. The group is also used as the framework for the required training measures which are provided irrespective of age. All employees are trained so that they can do any of the jobs required in a group. The company has also developed a special training concept to provide workers with the required technical and social skills and methodology.

In addition the company has a policy of recruiting older workers from the external job market. In recent years it has recruited a 58-year old general manager, a 54-year old skilled worker and a 45-year old environmental specialist. It is also planning to recruit an older, at least 53-year old, financial accountant. The recruitment of older employees is justified on the grounds of their special skills and experience.

Finally it should be noted that the high percentage of skilled workers in the production process and the preponderance of jobs for skilled craftsmen have meant that in general the underlying conditions favour the integration of older workers. Building on these underlying conditions the

position of older workers has been consciously recognized by the company. The introduction of new forms of production has not only maintained the value of older workers, which was already very high, but in some cases has even increased it. The introduction of new methods of working has created new skill and career opportunities, which allow particular account to be taken of the experience and skills of older workers.

#### 2.4, 3.4 135. The Chemical Industries of Northern Greece (Greece)

This organisation considers that the older workers are better workers, more loyal and more hard working than those aged 25-30 even though the latter are better trained and have finished technical schools. The organisation actively promotes health and safety at work. However there is a difficulty in getting workers and their TU representatives to protect themselves properly. In the case of poor health older workers are removed to less difficult or stressful positions without any reduction in wages.

The Chemical Industries of Northern Greece company began in 1962 firstly in Drapetsona and then in north, in association with the development of ESSO, now EKO, in an industrial complex of Thessaloniki. Though a private company 60 per cent of its shares are owned by the National Bank of Greece; these are shares they took over from the original owners, Bodosakis Co. A further 30 per cent of shares are owned by a French company. While not one of the recognised 'problematic' industries it did have considerable difficulties. It is a major manufacturer of fertilisers with 520 full time employees of whom approximately 100 are between 50-60 years of age. Approximately 60 employees are women.

In the past few years they have had to reduce their personnel. When the company began its operations the area was a service centre not a manufacturing one. Thus they had to find workers from the villages around and train them to become industrial workers; at that time labour was cheap but there were few trained industrial workers. This is the generation that is now leaving with two consequences; first, not only a reduction in total numbers but also a reduction in the number of ill or unhealthy people and secondly, the gradual predominance of a better educated labour force who can deal with automation. The company introduced voluntary early exit and those 250 people who took it were virtually all near pension age. They were interested in obtaining the bonus incentive. These were people who could go back to their villages in the Salonika district and occupy themselves once again with subsistence farming.

This generation of older workers was thus a very specific one who, without formal education, nonetheless had to learn everything on the job. They worked very hard and if they had some personal knowledge and an appropriate character became the foremen and shift leaders. Most thus developed on the job and could make a career for themselves because there weren't any Greek workers with appropriate technical education and training who could do the job. There is an interesting difference between the Greek workers' experiences in Greece and in Germany. In the latter the workers with proper technical training went into the positions of responsibility, while ordinary workers remained in the same jobs on the shop floor. This was not the case in Greece



where ability and willingness meant job promotion even without formal education. The company's experience is that the older workers are better, more loyal (filotimi) and more hard working than those aged 25-30. While the latter are better trained and have finished technical schools they do not necessarily work as hard. However it is also true that the particular generation of illiterate workers originally recruited, who have now mainly retired, were particularly difficult to train in relation to technical developments in the work place. The company does provide technical training to its workers.

The factory in Thessaloniki was originally designed to high standards by Americans. At that time in Greece no-one knew much about the environment (water, noise and atmospheric pollution) and they set standards for these that were much better than Greek factories and indeed are still good. The company tries to have a positive policy for health and safety at work since it is beneficial even in term of its own interests such as lowering insurance costs. However there is a difficulty in getting workers and their TU representatives to protect themselves properly e.g. using ear muffs, since they are not very aware of issues like hearing where the effects are not very evident till later in life.

In the case of poor health older workers are removed to less difficult or stressful positions without any reduction in wages; they are protected under Greek law since you can't move someone to an easier job and reduce their wages. This relates to pension rights since the last 5 years are important in the calculation of pension levels. In Greece as people get older they receive more bonuses and then become relatively expensive to recruit. This is different from Germany where there are fixed wages per job.

The company as part of its attempt to reduce the number of full time personnel has started to contract out services especially for relatively unskilled jobs such as guards, cleaners, restaurants, toilets, staff transport. In the latter case one of these was an employee who became a sub-contractor. ESSO chemicals has also done the same i.e. using its own people and helping them to become the subcontractors for certain jobs.

The contribution of older people in the labour force to industry and economic development is also clearly illustrated from a period thirty years ago when ex USA senior managers came out to Greece without remuneration, only their expenses were covered, to help newly established Greek industries start up. The ex-personnel manager and now consultant to the company pointed out that he had been hired by the company when he was 54 years; though he has recently retired from full time work at the age of 68, he nonetheless remains as an advisor to the company.

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### **136. Public Utilities (Greece)**

**2.2, 3.5**

In this organisation eligibility for training programmes is independent of age and training is normally available to within a year of retirement. Promotion is possible after 50 years of age. Management are aware that some older workers may find it difficult to carry out arduous tasks. Thus requests from older staff to switch to lighter work are viewed favourably.

**173**

The National Electricity Board or Public Power Corporation (DEH) founded in 1922 is publicly owned and responsible for the generation and distribution of power on a national grid and in local power stations throughout Greece. It is a major employer with 35,000 workers at sites throughout Greece though there are major power generating centres in Northern Greece (Ptolemaida), Evia and Peloponnese (Megapolis).

Recruitment is supposed to be through open competition and normally staff, once recruited, stay within the corporation for all their working life since it offers very good conditions of employment. Since the company belongs to the publicly owned sector like all civil servants there are recruitment limitations that do not permit recruitment after 38 years of age. Despite this as an employer it has a particularly active training and education policy which, operating at a national level, has an important impact for older workers in keeping them productive in the work place.

DEH has a large programme of training for all their staff and 25 per cent (7000) were in training programmes last year. Despite this they don't see themselves as doing 'enough'. Discussions are currently underway with another manager responsible for Insurance and Pensions specifically on the development of new policies for older staff. Eligibility for training programmes is independent of age and normally is offered to everyone including those within a year of retirement. Thus last year 1000 people were learning foreign languages; the company sees this as an investment in their staff even though it may not benefit them directly. The general philosophy is one of trying to meet the needs of the personnel with those of the company. They are very concerned with self development. They do not keep records by age though they will have computerised their records by next year and will be able to monitor what is actually happening in terms of age attendance.

Within the company promotion is possible after 50 years of age though no details were available on how frequently this actually occurred.

In terms of working conditions it is common practice for staff to make applications to transfer to lighter work as they get older and this is seen positively. In some directorates e.g. distribution where climbing the electricity distribution columns is a common task, older workers cannot undertake the strenuous tasks involved and are normally transferred to offices. This is done on a systematic basis with agreement with the trades union representative, though it is not a written policy by the company.

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**2.7, 6.4, 7.4**     **137. Plastic Manufacturers (Greece)**

This company pays workers extra if they have caring responsibilities. At one time the organisation had a policy of moving older workers to lighter jobs. However, as a result of technological advances older workers now work as production employees. The company has no negative policies concerning the development and promotion of older people within the company. While it has been operating a policy of voluntary redundancy, age has not been used as a criteria.



Petsetalos AE is a group of company manufacturing plastic goods and plastic tubes and with factories in Thebes, Attica and more recently Macedonia. It is a Greek company in existence for 35 years. In 1993 it had sales of 20,029 million drachmas, ranking 68th among the first 200 companies in terms of sales. The company employs 441 people of which 399 are men and 42 are women. They do not have foreign workers. Approximately 25 per cent of their employees are over 50 years of age.

While the company has no specific policies for older workers, nonetheless it does have a general policy for personnel which concerns the various premiums they can have in addition to their salary. They are paid for a 15.5 month year which is now embodied in the salary, and have a family bonus and payments if they care for someone e.g. someone who is ill in the family.

There is no special training for older workers - but only the training that is given for all workers.

They did in earlier times have a policy or practice to move older workers to lighter jobs however now older workers under the changed conditions of production with the introduction of new technology work as production employees. The company has no negative policies concerning the development and promotion of older people within the company.

They have been downsizing as a company but have not used age as a criteria for getting rid of workers. They do offer an incentive for those of their employees who wish to leave voluntary - e.g. while in law they need offer only 40 per cent of redundancy/compensation payments, in fact they offer 100 per cent compensation. In the case of older workers they also provide money for them to use to pay their IKA insurance contributions. In addition, they also give a bonus. However the company tries to have a policy of balancing its own needs with the social needs. Thus a person of 60 and over who isn't the worst worker and has no real hope of finding work elsewhere will not be the one who is asked to leave. 'He might not be the best but we shall protect him to finish his contribution years.'

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### 138. Salt Manufacturer (Greece)

2.2, 3.5,  
6.3

This organisation has retained staff past the normal age of retirement. For the company experience is very important and, if the job requires it, they will pay the higher rate for an older worker. In the situation where an older worker is having difficulty coping with their job they may be moved to a less demanding post. Provision of training does not depend on age.

Ellinikon Allas Epe has been in operation for 102 years and is a Greek owned enterprise concerned with the manufacture of salt. It employs 180 people.

The company's policy is to be less concerned with age than with productivity. When the majority have finished their contribution years (at the age of 65) they rush to leave. Most are semi-skilled workers. However in the case of the respondent, who was the personnel manager, he was 70 years

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old and continuing in employment. Salaries are higher as people get older, even if increases are limited. For the company experience is very important and if the job requires it they will pay the higher rate for an older worker. The company recently had to appoint a Director of Accounting. While they avoided recruiting someone who was in his 60s because he would have left after 5 years and they wanted to have someone who would be a 'nursery' to train others in the company, they did take on someone in his 50s.

When they have a specific problem with an older worker in relation to the actual carrying out of a specific job, they deal with the problem i.e. moving them to a less strenuous job, on an individual basis.

Training in the company is not carried out continuously, but in the past when they have undertaken training they have not discriminated against older workers - they make no differentiation on the basis of age. They do not have part time work and see unemployment as a serious problem.

### **1.3, 7.4 139. Shipping Company - informal policies towards older workers (Greece)**

This organisation does not discriminate against older people, although the physical nature of the work means that only a few workers are kept on past the normal age of retirement. The organisation tries to be supportive of workers with caring responsibilities. It has an unofficial policy of 'looking the other way' when a worker takes extra time off.

This company based in Athens is mainly concerned with cruise ships. It currently employs 150 people in their offices and 200 people at sea. It is a private Greek company that is currently being amalgamated and partly bought up by an American company. It has been in existence for 100 years.

They stated that they did not discriminate against older people. Clearly there were considerable differences between those employed at sea and on land, and job content changed as you went up in the hierarchy. Some jobs obviously did get more difficult to do e.g. a waiter at sea, if you were an older person, though if you had the ability and desire you could have moved on up into more responsible but less physically tiring work. Clearly some people avoided taking on responsibilities at work. Most employment of sea staff was for the cruise months of March to November. Sailors normally practised voluntary retirement - they just didn't appear to sign on again. Once they fulfilled their insurance contributions they rarely stayed on. On container ships the work is very hard and rarely do ordinary seamen stay on into older ages; however on the cruise ships employment conditions are more pleasant and the conditions of work easier - e.g. all the ships have lifts. So it is possible for sailors also to stay on. For those with skills, such as the Chief Engineer or the Captain, the company particularly needs them and is very content for them stay on. Many do so, well into their 60s. The company currently employs 2 or three captains who have already received their pensions and pays a very high rate of insurance stamp (normally the employers contribution is 24,4 per cent for IKA while for a pensioner it is 51 per cent; on other insurance funds the extra premium payable is 8 per cent more than the normal. Thus IKA in



particular makes the employment of pensioners very difficult. This explains why many go into self employment.

The company has a social policy - if one of their employees has social needs (family obligations, contributions years, ex convict) then even if they aren't the best they tend to look the other way. However this is a policy they have 'on the quiet' which they don't want to make widely known.

With respect to training they have participated in an EC funded training programme to deal with the new International regulations - IMO - and in this case all ages of employee participated.

The company asked to remain anonymous since it did not want to advertise its 'social policy'. However knowledge of other shipping and maritime companies in Greece suggests that they are not unusual in terms of such practices. The majority of shipping companies are still run on very personal bases and though Greek seamen are frequently more expensive than foreign seamen some shipping companies prefer them. The main problem lies in the low numbers applying to go to sea, particularly for ocean going ships and tankers. Thus older skilled workers who have a history with the company are often helped in their later working years while those with particular skills at the level of Captain and Chief Mechanic, are able to continue working both at sea or in the company's offices. One should note that most containers and tanker ships are registered abroad (Under LAW '89) which makes it easier for them to employ 'retired' Captains and Chief Mechanics and pay them abroad. This does not show anywhere, they do not pay insurance nor declare their employees' income for tax purposes - hence it is difficult to provide accurate figures on the numbers of older high level sea staff still working.

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#### **140. Inter-Continental Hotel (Greece)**

**1.1, 2.2,  
3.5, 6.3**

When this hotel was opened it recruited a number of workers who were experienced and aged in their 50s. Older workers are given the choice of continuing in employment past the normal age of retirement if they wish. This benefits the company since they are often doing jobs that young people applying to the hotel for employment do not want to do. The company tries to ensure that these older workers do not lose their pension entitlements by earning over the amounts permitted; thus they are not asked to work on Sundays or on holiday shifts where overtime is automatically payable, which would take them over the pension earnings limit. Training provision does not discriminate on grounds of age and, as it is based on experiential learning, is well suited to the needs of older workers. Where an employee can no longer cope in a job the company seeks to move them to less strenuous work.

The Inter-Continental hotel in Athens is a Greek, privately owned company, founded in May 1982. It employs 580 people. Among the 220 women employees 36 are over 50 years of age while among the 360 men employees 74 are over 50 years of age. The majority of employees are Greek with a few managers from abroad and specialist chefs.

Among those over 50 are included 26 pensioners who are still working and are in the age range 55-69 years; they are mostly IKA pensioners. Part time employment was until recently illegal in Greece, and the company has not yet introduced this form of working. The company's philosophy from its inception, has been to respect their personnel. When they started they took on two main categories of employee - those who were new to the business and those who were experienced, mainly coming from other large hotels and companies and already in their 50s. Thus 13 years later the company has many staff at or coming up to pension age. The company leaves them the choice of continuing in employment if they wish. This benefits the company since they are often doing jobs that young people applying to the hotel for employment don't want to do, such as kitchen staff, chambermaids and stewarding. The company tries to ensure that these older workers don't lose their pension entitlements by earning over the amounts permitted; thus they are not asked to work on Sundays or on holiday shifts where overtime is automatically payable, which would take them over the pension earnings limit.

The company aimed for and has achieved a low staff turnover; thus those employed stay with them. This does have a negative side in that others can't get in to work with the hotel. The company's experience of older workers is that they give a very good quality of work. The younger employees do more but are not very interested in quality.

The company has a full training programme for its employees, both those newly appointed and long standing employees. This training occurs regardless of age. Thus, as an example, kitchen staff are taught how to do their work more easily, the use of cleaning materials, new machines, the cost of breakage and their role in food preparation. Analogous training would be given for each job in the hotel. They have not evaluated the results of training but since they continue to do it they obviously believe that it is a very positive measure in ensuring higher productivity and good quality service. The methods they use for training are the 'Socratic' ones - of question and answer. Certainly they are based on experiential teaching and learning rather than classroom teaching and telling.

In situations where an employee can't physically manage the specific job they have jobs e.g. in the linen section where they can work while sitting down. The company reserves such jobs for pregnant women and older employees with health problems and does not reduce their pay.

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### 1.3, 2.2 141. Aluminium Manufacturer (Greece)

This company offers training programmes for its workers up to their retirement date. The methods used are both traditional and innovative. Thus people are typically taught in groups and in individualised ways using such methods as problem solving situations. An important company policy is internal promotion of its employees. Older workers already working in the enterprise are preferred if they have the necessary abilities rather than the recruitment of new individuals.



Aluminium of Greece is an independent Corporation in which 60 per cent of the share capital is owned by the French company, Pechiney. It has been in operation in Greece since 1961 producing aluminium through the processing of bauxite. It is located in what was a rural area of central Greece, in Boetia, employing 1600 people of whom 90 are women. In total approximately 500 people are over 50 years of age. They also employ 10 non Greeks but have no part time workers. In 1994 they ranked 8th amongst Greek industries in terms of sales with 66,514 million drachmas, and profits of 4,135 million drachmas.

The company's policy is to reward older people with a better wage even in the case where a young person is doing the identical job. Furthermore there are bonus payments with seniority going up to 35 per cent of basic earnings, which mainly benefit older workers. since these are usually the most senior in the company. Retirement is at the age of 60 years since 95 per cent of all employment has been characterised as heavy and unhealthy industrial work. For this reason they don't have a policy of taking on older workers.

The type of work has changed because of technical innovations and it is no longer physically exhausting. A large number of workers monitor and intervene in the production process with the help of modern technology. This has meant that the company has invested a lot in modernising and in training programmes. Training is given to all workers up to their retirement. The methods used are both traditional and innovative. Thus people are typically taught in groups and in individualised ways using such methods as 'problem solving situations'. The company has a special training service for its workers; on special subjects they co-operate with external trainers.

In evaluating older people's performance in training situations, the company did find some problems with the very specific group of older people recruited initially at the start up of the company, since they were mainly illiterate farmers/shepherds from the area who found learning very difficult. But this is no longer the case and most workers including older workers, learn the new technology easily.

An important company policy is internal promotion of its employees. Older workers already working in the enterprise are preferred if they have the necessary abilities rather than the recruitment of new individuals. Of course someone of 50/52 years could be promoted but this wouldn't hold for someone of 58 since they would be too near to retirement. Older employees are promoted to the position of foremen.

The company is concerned about the welfare of their pensioners and gives them a very good bonus as well as a pension from a private insurance scheme. This is unique in Greece.

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**142. Sklavenitis AE (Greece)**

The company's policy is to try and retain staff over the long-term. Thus they have many employees who have been with them for many years who normally stay with them until pension age although management are very sympathetic to applications from workers to stay

**1.1, 1.3,  
2.7, 3.5,  
6.3****179**

on after retirement age. Promotion in the company is independent of age and it is not unusual for an individual aged over 50 to be promoted to the post of store manager. If older workers for reasons of health cannot deal with the demands of their particular job position and need to be employed in a less tiring job, they may be transferred to another department with less demanding work.

This is a privately owned Greek company with 26 super markets in the region of Attica. The company started in 1951 and employs 2400 employees of which 972 are men and 1264 are women. 310 employees (14 per cent) are 50 years and over. The company employs part time 92 men and 166 women mainly students, however they also employ a few pensioners. The company ranks 32nd amongst the 200 most profitable Greek companies with profits in 1993 of 2,081 million drachmas.

The company's policy is to try and retain staff for a long time. Thus they have many employees who have been with them for many years who normally stay with them until pension age. The last five years of employment are important for older workers since this determines the level of final pension to which they are entitled and the company is quite sensitive to this issue.

The type of work that the company has in sales and warehousing etc., is not interesting to older workers who normally are looking for jobs with more responsibility, thus the company rarely recruits someone over the age of 50 years. They do employ older workers as guards and at this moment they have between 40-50 people in such positions who are over 50 years of age.

Promotion in the company is independent of age and it isn't unusual for an individual over 50 to be promoted to being a store manager.

Training is given to all staff and usually the initiative for the training originates with the manager of the store. Thus, for example, to the sales staff training is given on correct customer behaviour. Additionally pamphlets are made available to staff with information on how to be productive in their work.

The company is concerned about 'its own people' and doesn't easily fire workers. Thus if some older workers want to complete their insurance contribution stamps until reaching pension age or other workers want to continue working after getting their pension, the company examines their applications in a positive manner. If older workers for reasons of health can't deal with the demands of their particular job position and need to be employed in a less tiring job, they can be transferred to another department with less sales which involves less physically tiring work. The company's policy is to be concerned about each individual worker.

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**1.6, 2.1, 5.2**     **143. POPE Recruitment Agency (UK)**

This project aims to assist older workers to find jobs. Each older person coming to the agency is provided with initial one-to-one advice and guidance. Information collected during this interview is matched against POPE's register of employment vacancies. The project is

marketed to employers by personal visits by POPE staff. POPE also offers a one week programme of job-search training and job interview practice, employment counselling and guidance, confidence building and goal setting.

The origin of the POPE project was as a bid under the UK government's Training and Enterprise Council (TEC) Challenge initiative. The aim of the initiative was to support the development of time-bound innovative local projects which would reduce adult unemployment, particularly long-term unemployment; encourage business growth and job-creation; and develop the local skills base. The UK's network of TECs, which have responsibility for administering training programmes for long-term unemployed people, were invited to submit bids to the government under this initiative to run pilot projects. The POPE bid was submitted by Bradford and District Training and Enterprise Council and was one of 27 bids which were successful.

The overall aim of the project was to assist people aged over 50 into jobs. The project was called POPE which stands for 'People of Previous Experience'.

The project had four main elements:

- \* the creation of a register of unemployed people age 50 and over seeking work in the Bradford area;
- \* marketing of the service to employers and identification of suitable vacancies;
- \* provision of a computerised matching service which was free of charge to both unemployed people and employers;
- \* a £2000 subsidy to employers who took on someone from the register (this was paid in two parts: when the person was first taken on and after they had been in the post for 6 months).

Employers were eligible to receive the subsidy if: the person taken on was taking up a newly created post and the recruit had to be aged 50 or over and to have been unemployed for 26 weeks prior to being recruited.

The project employs five staff. All the trainers are older people, have experience of working in industry in executive positions and were unemployed prior to being recruited.

The project is promoted through an information pack and leaflets (in several languages) which were distributed through job centres, job clubs, community organisations and providers of adult training. Job centres refer clients to POPE. Considerable use is also made of the local media. As the project developed and knowledge spread, many clients stated that they heard about it from an existing client. Project workers have also made presentations to job centre staff. Staff say that the literature tends to attract better educated clients.

Clients are provided with recruitment advice and an advisory service. Prior to registration on the database, each client's needs are discussed with a consultant for approximately one-hour. Each

client's skills, experience and job interests are recorded on a computer database. Client details are matched against POPE's register of vacancies.

Statistics for the first year of operation indicate that the project was largely successful in achieving its targets and succeeded in exceeding some. However, the project struggled to meet its target of 25 placements from members of minority ethnic groups.

POPE has registered 1321 unemployed people since September 1994. Of these 1099 were men and 222 were women. However women are more likely to find employment through the scheme. A total of 184 of clients have obtained work through POPE (including 7 temporary posts) since its inception, with 90 of them having been placed since January 1995.

**integrated:** **144. DSM Limburg BV (Netherlands)**

2.1, 2.4,  
2.5, 3.3,  
3.7, 4.1,  
4.3, 5.1,  
5.2, 7.3,  
7.5

This organisation has implemented a policy of enabling staff to remain with the company up to pensionable age (65). A predicted change in the age profile of the workforce has proved an important impetus to the development of an age-aware personnel policy in conjunction with the employees' organisations. Features of the policy include changing the prevailing organisational culture and providing opportunities for second careers in the organisation.

DSM Limburg BV originates from the state-owned coal mines. Since the closure of the mines in the 1960s the company has been transformed into a privatised modern chemical group.

In the past few years virtually no new (ie young) employees have been taken on. At the same time early retirement opportunities have been drastically reduced and a deliberate policy has been implemented to enable staff to continue to function up to pensionable age (65). In view of this internal and general demographic trend a marked ageing of the workforce is anticipated in the next five years. Unless there is a change of policy the number of younger workers (aged 35 and below) is expected to fall in the next five years from almost 3000 at present to just over 1000 in the year 2000. At the same time the number of those aged 40 and above will increase sharply.

This predicted change in the workforce has proved an important impetus to the development of an age-aware personnel policy over the next few years. This is accepted by both the company and the employees' organisations and set out as such in a statement of intent relating to the 1994/96 collective wage agreement.

What is special about this example is that the development of this policy has been very emphatically linked to social systems, either existing or to be created, in close consultation with the employees' organisations. The chosen form of an extended experiment in achieving a well-founded age-aware personnel policy, with the effects on working conditions and terms of employment also being taken into account, make this an interesting example.



On the basis of discussions with various internal and external parties involved, various preliminary studies and the results of various polls of (ex)DSM employees, the emphasis was put on an experiment in which on the one hand an attempt would be made to achieve the change of culture considered necessary and on the other hand the effects of such a policy on the terms of employment would be constantly monitored.

The experiment has three components, namely (a) programmes of action in each of the 17 departments, (b) a pilot study of the possibility of achieving the desired cultural change by means of a course-based approach, and (c) a pilot study in one division of developing a meaningful second career phase in a situation with relatively arduous physical conditions where the level of 'ageing' is above average.

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#### 145. Municipality of Groningen (Netherlands)

**integrated:**  
**2.7, 3.2,**  
**3.6, 5.1,**  
**5.2, 7.3**

The Municipality of Groningen has an age-aware personnel policy. A recent review paper makes a number of recommendations for future activities including: enabling older staff to work between six and seven hours per day, possibly in combination with shedding more arduous tasks; and to create conditions to enable managers to give sufficient attention to both task-orientated and social-emotional elements of management.

The Municipality of Groningen has been active for some years in the field of a more age-aware personnel policy. For example in the policy paper 'How long can you, How long must you, How long do you want to go on working?' there is discussion of the personnel instruments essential to a good age-aware personnel policy. In addition this paper can be seen as a good tool for changing the image of older employees.

In the Progress report on age-aware personnel policy in the Municipality of Groningen the situation as of 1 January 1994 is evaluated, and on the basis of the conclusions, recommendations are formulated for the years ahead. Among these recommendations are:

- further expansion of the personnel information system into a management information system;
- tailor-made arrangements for the separate services in addition to the general organisational objectives;
- more attention to be paid to the influx of young staff to maintain standards in the organisation;
- the encouragement of mobility and training by means of target figures for the separate services;
- to enable older staff to work between 6 and 7 hours per day, possibly in combination with shedding the heaviest tasks;

- to create conditions to enable managers to give sufficient attention to both elements of management (task-orientated and social-emotional).

**integrated:**

2.4, 2.5,  
3.2, 3.3,  
4.1, 5.1,  
5.2, 7.1,  
7.2, 7.3

**146. Gist-brocades (Netherlands)**

This organisation has identified a business case for diversity in the composition of its workforce. Several age related policies have been introduced. These include: interviews with all staff aged 55 to obtain their views on their possible deployment in the next few years and the reasons on which these are based; exit interviews; an investigation into possible jobs which should preferably be done by older workers; raising the early retirement age from 60 to 61; research into the possibility of organising responsibilities and jobs in such a way that account is taken of the strengths and weaknesses, preferences and dislikes of staff in different age ranges; research into part-time shift work; and research into after-work facilities as part of the overall package of terms of employment.

Gist-brocades in Delft employs 2164 staff. Of these, 1089 people (50 per cent) are over 40. By the year 2000 over half the staff will be 45 or above. For this reason Gist-brocades pursues a policy which responds to a working population which on average is growing older. 'It can't be solved by regulations and 'phantom jobs' for older employees, and apart from that acting as if the world consists solely of 35-year-olds. It requires an organisation which calls in an appropriate way on the strengths of staff of all age-groups, including older staff', is the company's view.

A new HR policy has been implemented to support the desired developments in the organisation. This policy seeks to take maximum advantage of employees' individual strengths and weaknesses. At the beginning of 1993 a survey was conducted into the significance of growing older in the organisation. In fact this survey already created a 'point of no return'. One of the things that emerged from the survey was that there is a great deal of emphasis placed on problems associated with vitality. The findings of this survey and the examination of age trends conducted at the end of 1993 have led to action being taken to produce a positive change in vitality. Policy is being conducted in three levels, namely:

- \* curative policy
- \* preventative policy
- \* strategic policy.

The actual implementation of the levels of policy is being translated into pilot studies within the previously investigated populations. A successful pilot can subsequently be extended to another group or other parts of the organisation. Instruments introduced at the end of 1994 include:

- \* older staff interviews: interviews are conducted with all staff aged 55 and above relating to the exchange of views on their possible deployment in the next few years and the reasons on which these are based;

- \* exit interviews;



- \* a follow-up investigation into possible jobs which should preferably be done by older staff (not soft options);
- \* raising the early retirement age from 60 to 61 and two- stage early retirement from 1 July 1997;
- \* the company is working specifically towards a change of image in management of ageing in labour organisations;
- \* research is being conducted into the possibility of organising responsibilities and jobs in such a way that account is taken of the strengths and weaknesses, preferences and dislikes of staff in different age ranges;
- \* research into part-time shift work;
- \* research into after-work facilities as part of the overall package of terms of employment.

As regards strategic policy Gist-brocades is in the process of finalising implementation of a completely individualised social plan. The staff involved receive an individual tailor- made package, based on a series of criteria, ie not solely on age and length of service.

It is important that a support base has been created in the organisation for the efforts which are being made. The management has confidence in its vision of the company in the year 2000. The staff have confidence because they are being valued and that the policy also has practical results.

The expectation is that in a few years' time Gist-brocades will be an example to others with the fitness of its organisation, regardless of its age structure.

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### 147. Centraal Beheer (Netherlands)

This organisation has developed instruments to enable older staff to continue participating in work and to retain their motivation. These include: career counselling and job-training for all; lateral job changes or a reduction in responsibility for older workers; the sale of hours worked in order to build up a sum to provide extra income in retirement or to spend this sum to be able to stop work earlier; and allowing workers aged 55 or over to work a four day week. In addition, there is no age discrimination in terms of job recruitment or training. Also early retirement has been abolished and a programme of flexible retirement has been introduced instead.

**integrated:**  
**2.4, 2.5,**  
**3.5, 3.6,**  
**3.7, 3.8,**  
**4.1, 4.2,**  
**5.3, 7.3**

Centraal Beheer is an organisation with a relatively young workforce. Two thirds of the present staff of 2673 are under 40. Consequently Centraal Beheer expects no major problems connected with ageing in the near future - certainly not in view of the expectation that there will at any rate be no stagnation in the recruitment of younger well qualified personnel until the end of 2009. This does not detract from the fact that the organisation does recognise demographic problems in the labour market in the longer term and is trying to respond to them with a good age-aware personnel policy. As early as six years or so ago Centraal Beheer began developing instruments to enable

older staff to continue participating in the labour process and retain their motivation. Those instruments include:

- \* Training: at all stages in a person's career account is taken of individual ambitions. This can be achieved by enabling staff to remain constantly up to date in their specialist field, but also by counselling them in the event of a reorientation such as another choice of career. Educational and training programmes are geared to this.
- \* For older staff possibilities are investigated of taking a step back or sideways in good time and without loss of face. This can be achieved by modification of working hours (no more overtime or irregular hours), but also through the reduction of work pressure. Another possibility is to switch to a job which is less demanding.
- \* As regards increased flexibility Centraal Beheer is a pioneer. The CB select system enables staff to buy or sell time in order to be able to divide up their work time as they wish. For example it is possible to sell paid reduced- working-hours and in so doing to build up a sum to provide extra income in retirement or to spend this sum to be able to stop work earlier.
- \* Over-55s can also create a 4-day working week for themselves by means of this terms of employment options system.

In 1993, in order to expand the age-aware personnel policy further a study group on 'policy on older employees' was set up. In this study group the personnel management of Centraal Beheer, the works council and the FNV are represented. In consultation with older employees the study group wishes to seek the right balance between working and correct motivation. The study group has meanwhile submitted an interim report with recommendations to the company's Board of Management. In one of those recommendations the study group argues for individual solutions which motivate older employees and are designed to enable them to pass on their knowledge and experience for longer to the younger generation of staff.

**integrated:**

**2.4, 2.5,  
3.1, 3.2.,  
3.3, 3.6,  
3.8, 4.1,  
4.2, 4.3,  
5.1, 5.2,  
6.1, 7.3**

#### **148. WAVIN (Netherlands)**

This company pursues a personnel policy which aims to keep all employees productive and healthy as far as possible and up to retirement age. No separate older employees' policy is pursued, but the effect of this approach is that there is in fact also a 'personnel policy for the over-45s'. In respect of the previously distinguished points of action for 'good practice' the policy of this organisation can be summarised as follows:

- \* Recruitment: there is no question of any age discrimination in recruitment and selection. The focus is solely on suitability.
- \* Training, education and career development: the available programmes are accessible to everyone. Extra attention is paid to the capacity of older staff and there is structural emphasis on the fact that training is meaningful for older staff. The company has long operated career-review and performance interviews. With effect from 1994 the plan is to intensify this policy and achieve a 100 per cent score.



- \* Increased flexibility: as regards increased flexibility and job rotation older staff are not excluded. Policy on this point takes the form of tailor-made packages wherever possible. For years there have been age-specific holiday schemes (laid down in each collective wage agreement) which are a component of policy. The existing early retirement schemes were abolished with effect from 1 January 1994. They have been replaced by a flexible pension scheme, one of the first in the Netherlands. With the exception of the extra holidays in the collective wage agreement there are no separate schemes or policy plans for older staff, though a flexible 'tailor-made' pension is still being finalised.
- \* Ergonomics and adaptation of the workplace: recently more attention has been paid in the company to the workload and capacity of employees, including older employees.
- \* Combating negative images: the company is not campaigning specifically on this point. Such a policy is not considered necessary.

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### **149. Motor Vehicle Component Manufacturer (UK)**

**4.1, 4.4,  
5.3, 6.2,  
6.4**

This company's change in attitude towards older workers coincided with a takeover by a multinational motor vehicle manufacturer. Following the takeover it was decided that redundancies were required. However, a performance-based scheme which eschewed the use of age was used on the grounds that it was important to retain the best employees regardless of their age. The company is also in the process of re-designing jobs and the workplace in order to reduce the health risks to the workforce.

This employer is a manufacturer of starters and alternators for the automotive industry. It employs 782 men full-time, 90 women part-time and 257 men part-time.

The changes in employment policy made by this company followed a takeover by a multinational motor vehicle manufacturer. This was followed with the implementation of strategy for a radical restructuring of the company, resulting in a programme of redundancies. This was considered to be essential in order that the company might compete with Japanese motor manufacturers. This company's policy eschews the use of age as one of the criteria for selecting staff for redundancy. Instead management have introduced a policy of compulsory redundancy whereby staff reductions are targeted to make sure that the best employees are retained, thus increasing the average quality of the workforce, and maximising the chances of the remaining majority of the workforce having a future with the company.

To identify staff for redundancy the company has invented a concept called the 'zone of indifference' whereby the company works out the rankings of all employees in performance terms. The key issue is the relative and absolute distance between employees. For example, two employees given similar ranking could display widely different levels of performance. However, if employees are relatively close and absolutely close, then the company is 'indifferent' as to which of them leaves. If one of these employees volunteers, then they are allowed to go. Initial resistance by management, staff and trade unions has been overcome by a considerable amount of

communication and consultation. This policy replaced one of reducing staff numbers through voluntary redundancy.

In addition, the company has introduced policy called 'easy working' which is an attempt to re-design the working environment to make work tasks easier to perform in order to reduce the possibility of injuries to staff and to maximise the working lives of employees. It involves, for example, reducing the gaps between machines where people have to lift things across, the height at which people have to lift objects, and the amount of repetitive movements they have to make. The initiative is at the pilot stage and the company believe it will take 10 years to implement fully. The company is also promoting job changes to avoid repetitive strain. The company has negotiated flexibility agreements with the trade unions whereby job demarcation has been reduced significantly. Under the agreement, an employee with a health problem caused by carrying out particular repetitive actions can move to job where such actions are minimal. The company is also in the process of changing from straight production lines to 'U' shaped production lines in order to improve communication between team members and to reduce stress in the working environment.

1.2, 1.3,  
2.4, 3.5,  
3.7, 3.8,  
7.4

### 150. Health Authority (UK)

This public authority does not apply age bars to recruitment advertisements and training opportunities. It offers considerable flexibility in retirement. The organisation's equal opportunities document carries the statement that it does not discriminate on grounds of age. Nurses are able to retire at any age after 55 and many work beyond the normal retirement age of 65. In addition, staff can retire at the age of 60 and then be employed at a lower grade with fewer responsibilities and less stress until the age of 65. The organisation also operates a gradual retirement scheme for hospital consultants. The organisation has been developing a carer's policy.

It is concerned with the organisation and delivery of health care as part of the National Health Service (NHS).

The authority does not include age ranges in recruitment advertisements and training opportunities. It offers flexibility in the age at which nurses can retire: any time after 55 up to normal age of retirement at 65. It also allows many staff to stay on past the normal retirement age if they wish and if they have particular skills, although there have been complaints from the staff associations if they keep too many staff on after the age of 65. This view is based on a belief that, with the high level of unemployment, it is unfair to retain staff who could retire and stop people who may be taken from the pool of unemployed. Similarly medical consultants can apply to remain in employment up to the age of 70.

The authority's equal opportunities document carries the statement that it does not discriminate on grounds of age. As part of the equal opportunities policy, each job must have a job specification and, as long as individuals have the skills and experience that the specification requires, plus the



qualifications (if they are required, something the HA avoids where possible), they will be deemed to be eligible for the post, whatever their age.

Staff can retire at 60 and take their pension, and then be reemployed in a lower grade with fewer responsibilities and less stress until the age of 65. This has the advantage of retaining able employees who might otherwise seek to retire. There is also a partial retirement scheme for consultants which had its origins in a report titled 'Achieving a Balance' which appeared in 1988, following a review of the wastage of medical students. The idea was to try and free up some more consultant posts for the young people coming through by allowing doctors to, particularly where they work for more than one HA, which many consultants do, drop part of their contract and take partial retirement. This programme applies from the age 50.

As part of a general NHS policy, when the HA has suffered from shortages of nursing staff it has attempted to bring back and retrain women who had started careers as nurses and then left to start a family. Recruitment advertisements have targeted nurses wishing to return to employment.

Within the HA there has been a programme of career counselling for junior doctors and doctors who get to a particular level who want to move on. This includes those who are described as 'stuck doctors'. These are doctors who have not made the expected career progression. The principle is that such staff receive counselling by a consultant, called a clinical tutor, who advises them about their career options.

The HA is currently developing a carer's policy. The policy document has been drafted and is being discussed between management and staff representatives. Despite the lack of a formal policy the HA recently allowed a member of staff with such a responsibility to take unpaid leave for almost two years. The personnel department kept in touch with her and her job was kept open.

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### **151. Manufacturer and Wholesaler of Medical Products (UK)**

**1.2, 2.2,  
3.2, 3.7**

This company is reluctant to put age bars in recruitment advertisements and age is included in its equal opportunities statement. Training is provided for all, regardless of age. Women's and men's pension ages have been equalised although women can retire at any age between 60 and 65. The company also offers flexible working hours, a career break scheme and special leave for those with caring responsibilities.

This manufacturing and wholesale company employs 450 men full-time and 1000 women full-time and 250 women part-time. The majority of employees are employed in semi-skilled jobs.

According to the manager of employee resourcing, most of the company's human resource policies were not developed with older workers in mind. Management have not considered the ageing of the population. Nevertheless the manager of employee resourcing is following an Institute of Personnel Management (now the Institute of Personnel and Development) code of

practice on employing older people which states that age should be an irrelevant factor in human resource management.

This manager is reluctant to put age bars in recruitment advertisements on the grounds that ability and achievement are more important criteria than age. Age has been included in the company's equal opportunities policy for three years. The medical products industry is labour intensive and training is provided to all regardless of their age. All staff are generally able to adapt to the introduction of new skills or processes.

Women's and men's pension ages have been equalised although women can retire at any age between 60 and 65. Approximately five per cent of staff work past the normal retirement age under the same terms and conditions as previously. The company also offers flexible working hours and a career break scheme. However, the manager of human resourcing does not think that this initiative has been marketed particularly well. This has resulted in a low take-up.

The company operates a scheme whereby carers are allowed a period of absence from work. Again, the personnel manager does not think that this scheme has been marketed effectively. As a result few staff have taken advantage of the scheme.

It used to operate a last in first out redundancy policy but this has been changed to a performance based scheme. According to the manager of human resourcing, staff are sometimes made redundant by technological change but age is not a factor in any decision to make a member of staff redundant. The company does not operate an early retirement scheme.

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**1.2, 3.6, 3.7**     **152. Gas and Oil Exploration Company (UK)**

This company does not include age bars in recruitment advertisements. In addition, staff can leave on an undiscounted pension at any age between 60 and 65. Sometimes, if they have particular skills, workers may be retained beyond retirement age. Flexible working hours are also offered to employees with caring responsibilities.

This company employs 760 men full-time, 278 women full-time and two part-time. The majority of staff are employed in skilled-manual and clerical jobs. The company also employs a large number of technical staff and scientists. It has grown rapidly over the last 10 years from employing approximately 100 employees to over 1000 with between 2000 and 3000 employed on contracts. The average age of the workforce is approximately 37 years of age. The company is aware of the issue of the ageing of the workforce but does not consider this to be a major problem at present because of recession and changed economic circumstances within the industry. However, according to the company's human resource supervisor, the company 'makes all decisions about hiring, training, compensation, development and firing based on equal employment opportunities issues'.



The company does not include age bars in recruitment advertisements, believing that staff should be selected on the basis of ability. In addition, briefs given to recruitment agencies include experience specifications but not age bars.

It offers flexibility in retirement such that all staff can leave on an undiscounted pension at any time between the ages of 60 and 65. Before the age of 60 staff can retire on a discounted pension. However, this offer is seldom taken up. In fact only 10 staff have used the scheme since 1980 although a major factor here is the relatively young average age of the workforce. The only member of staff to take up this option recently asked to return to the company shortly afterwards.

The profile of the company is such that a number of women employees are of childbearing age. The opportunity to work part-time is also offered to women following maternity leave. Part-time working has also been taken by one older member of staff who was suffering from ill health. Part-time working would also be made available to anyone who was caring for an elderly relative.

All employees are kept up-to-date with technological advances. In fact some older employees are working at the cutting edge of their profession; for example, in the area of Geophysics. Sometimes, where an employee has particular skills, they are retained past the company retirement age on a part-time basis on an annually renewable contract.

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### 153. Glaxo Research and Development (UK)

This organisation's equal opportunities statement proscribes age discrimination. In addition, recruitment advertisements do not carry age limits. The organisation also offers care leave of up to five days a year. Staff with caring responsibilities also benefit from a policy of encouraging part-time working and job-sharing. In addition, the organisation's reviews of its performance pay system include checks for age bias. The organisation has also operated a policy of targeting women returners for secretarial and technical jobs. Glaxo R & D operates a phased retirement scheme.

**integrated:**  
**1.2, 1.3,**  
**1.5, 1.7,**  
**2.2, 2.3,**  
**2.4, 2.6,**  
**3.2, 3.8,**  
**7.1, 7.4**

This organisation operates as a semi-autonomous company within a group which makes up the major British pharmaceutical company. The group has grown rapidly over the last 15 years. Recently its parent company merged with another pharmaceutical company to form one of the world's largest pharmaceutical conglomerates. It employs 1449 women full-time, 1871 men full-time, 158 women part-time, and two men part-time.

A stereotypical view of research and development companies is that they only want to employ young graduates who, after ten years, will be discarded in favour of other recent graduates. The company's management believes that, while 'cutting edge' skills are essential, continuity and knowledge are equally important. Indeed management believe that developing a culture in which older workers are respected and valued and their skills are utilised is essential. It adds value and competitive advantage from staff whose talent has already been purchased and developed.

Glaxo R & D first recognised the issue of an ageing workforce in 1988 and initiated a major study to examine the implications for their employment policies. Its purpose was to identify the extent to which the organisation would be affected by declining numbers of school leavers and new graduates. Traditionally, it has recruited school leavers at age 18 with 'A' levels, recent graduates at 21, and a few people with PhDs at age 24. The company has a tradition of long service which means that the relatively young average age of the workforce has not come about because of the departure of large numbers of older workers. Older workers tend to predominate in the original core of the workforce. Nevertheless, management believed that if they continued to seek to recruit large numbers of younger people this would result in a very unbalanced workforce.

Based on the recommendations of the report which was produced in 1989 Glaxo R & D has made a number of changes in its human resource policies. It believed that it faced 30 per cent downturn in the number of young people entering the labour market and that it would see a reduction in the choice and/or quality of graduates and, therefore, it wanted to broaden its recruitment base to include older workers. Management also want to be sure that they retain the staff they have already recruited because it is felt there is likely to be an increase in competitive pressure from other companies.

The company has tried to eradicate age discrimination in number of ways. For example, recruitment advertisements do not carry upper age limits. The company is also in the process of removing lower age limits where possible. In addition, it ensures that qualifications, skills and experience are job relevant. Glaxo's equal opportunities statement also proscribes age discrimination in terms of recruitment, selection, promotion, training and development. The statement had its origins in a project on equal opportunities chaired by the Director of Human Resources.

Glaxo R & D also makes available care leave of up to five days a year which assists an employee with, for example, an urgent domestic problem such as short-term responsibility for caring for an older relative. Older workers are not excluded from training programmes. They are given equal access to training and development in technical and personnel fields. The company also operates an open learning system which supports its aim of encouraging a learning culture.

In addition, annual reviews of the company's performance pay system include checks for bias by grade, sex and age. Some older staff have said in the past that younger employees have been favoured in terms of pay. This has been examined by personnel and has been shown to be untrue. The data are published by the company.

Glaxo R & D has also taken positive action with regard to recruiting older people. For example, it operates a programme called 'Women Retainers' which was introduced because of the high turnover of secretaries. The policy included a recruitment drive and an advertising campaign which specifically targeted women wishing to return to employment.



### 154. St Ivel (UK)

Older people are not given particular priority in this organisation. Rather they are accorded equal access as part of an overall policy of encouraging labour force diversity. Managers are provided with equal opportunities training which covers the issue of age discrimination. In addition, employees nearing the age of retirement are given an extra holiday entitlement to facilitate their winding down. The organisation has also removed age bars on entry to its pension scheme. Additionally, if a member of staff has particular expertise they may be kept on past the normal age of retirement. Finally, the organisation has offered semi-skilled older workers the opportunity to undertake an accelerated two year apprenticeship to enable them to work on skilled craft tasks.

This private sector company is involved in food and related distribution. It employs 8029 men full-time, 2038 women full-time, 509 women part-time, and 85 men part-time. It is a national company with outlets spread across the UK.

In 1989 St Ivel conducted a project which looked at demographic trends and what the company's staffing needs were going to be for the 1990s. The report concluded that the company would not face a significant shortfall in the number of new recruits, a view which, the management believed, was subsequently borne out by the effects of the recession. Nevertheless, it was felt that increasing diversity in the composition of its workforce would bring commercial benefits and, therefore, St Ivel proceeded to introduce policies to assist the older worker as part of a new equal opportunities policy which was implemented two years ago.

Older people are not given particular priority in the company. Rather they are accorded equal access as part of an overall policy of encouraging labour force diversity. It was during management discussions about equal opportunities that the issue of age discrimination was first raised.

St Ivel already had an equal opportunities policy although senior managers felt that not enough work had gone into promoting the policy in the past. The company approached the Employment Department for advice on developing an equal opportunities strategy. The policy was promoted to line managers on the basis of its economic benefits. For example, managers were told that, since a large proportion of products were sold to women, the company should not be seen to discriminate against women in its policies.

Age is not included in St Ivel's equal opportunities statement which is given to all staff in the organisation. The reason given for this is that age discrimination is not covered by existing employment legislation. However, all managers are also provided with equal opportunities awareness training which covers age discrimination and the problem of indirect discrimination. Those managers involved in recruitment receive more training than others. Employment agencies are instructed not to apply age bars in any recruitment they carry out for the company.

**integrated:**  
**1.2, 1.5,**  
**1.7, 2.1,**  
**2.2, 2.5,**  
**2.6, 3.3,**  
**5.2, 6.2,**  
**6.4**

Older people are not targeted when redundancies are required. Management do not ask older people to volunteer. In fact, the emphasis is not on early exit. For example, the organisation does not operate an early retirement scheme. Employees can approach management about the possibility of early retirement but these are one-off arrangements. The company has granted an additional holiday entitlement to people nearing the date of their retirement in order to facilitate their winding down. St Ivel has removed age limits on entry to its pension scheme. Now recruits can enter the pension scheme up to the normal age of retirement of 62 years.

The company's recruitment policy appears to have been successful. Over the last 18 months 18.6 per cent of recruits have been in the age range 41-50, 6.9 per cent have been in the age range 51-60 and 1.4 per cent have been in the age range 60 and over. Older people have been encouraged to undertake milk sales franchises with the company although milk sales are being scaled down due to economic pressures within the whole industry.

In terms of employee development, the company actively encourages employees to train to keep their skills up to date. Every employee has a 'performance improvement review' (performance appraisal interview) to look at what work they will be doing in the coming year and what skills they will need to be able to achieve their goals. If employees feel they are short of skills then, in consultation with their line managers, a programme of training is devised. The review is mandatory for all employees and training is open to all, regardless of their age.

As a response to a shortage of skilled engineers and primarily because they were no longer getting the same volume of younger applicants as previously, and additionally in response to technological advances, St Ivel offered older workers in the production area the opportunity to do an accelerated two year apprenticeship to enable them to work on skilled craft tasks, despite resistance from the trade unions.

**integrated:**  
**1.2, 2.1,**  
**3.8, 5.2,**  
**7.1, 7.4**

### **155. London Borough of Hounslow (UK)**

This organisation does not include age barriers in its recruitment advertisements. Staff involved in recruitment and selection receive training in how to avoid age discrimination in the recruitment process. The borough also offers five days paid and five days unpaid leave to staff who have sick dependants. It is possible for staff with caring responsibilities to vary their working hours. In the year before they retire staff are also able to undertake training in areas related to hobbies or pastimes they would like to follow while in retirement. Finally the organisation has produced a comprehensive statement of policy on age discrimination.

This local council contains the following departments: social services; consumer and environmental services; building cleaning; catering; education; finance; housing; leisure services; planning and transport; property; administration and support; legal; and policy. This organisation employs 5,295 staff of whom 3,342 are women and 1,953 are men. This council's policy on age is in the early stages of implementation. It had its origins in an equal opportunities in employment policy which was produced in 1986. This was followed up by specific statements on particular



issues later. A statement on age has recently been published. Because of its comprehensiveness the entire age policy is reproduced in this case study.

At the time of the development of the policy on age the authority was beginning the process of shedding staff and this has only recently become a major issue within the council. Trade unions have been consulted over the implementation of the policy. The personnel manager thinks that union policy at a national level is likely to differ from that locally. He has been told of incidents where older council employees have been put under pressure from union officials to accept redundancy.

When the council's equal opportunities policy was introduced a comprehensive programme of training was undertaken. Since then equal opportunities training has been incorporated into the staff training and development programme. However, training is not mandatory. This means that some staff may not have received equal opportunities training.

Responsibility for the issue of age discrimination in employment lies with the personnel officer responsible for equal opportunities. Another officer has responsibility for the issue of ageing and how council policies relate to this issue. In addition, other personnel policies have been amended and now refer to age. For example, the organisation's policy on harassment proscribes harassment on the grounds of age. Similarly, statements on redundancy and training proscribe different treatment of older workers.

When the equal opportunities policy was first launched all staff received training in equal opportunities. The policy is being relaunched in 1995 and training sessions are being run for all staff. The personnel manager thinks that, for most people, equal opportunities is about race and gender and he is concerned to get the message that there are other groups who are disadvantaged in the workplace.

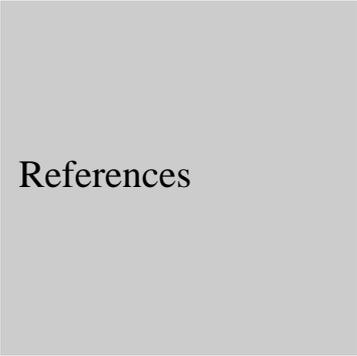
Another area where the council has acted is in terms of awareness training for staff who come into contact with older people in their work. In 1992 the council ran a pilot 'age awareness' programme with 50 sheltered housing wardens and housing officers in the Housing Department. Half-day workshops examined models of ageing and how stereotypes could influence work practice. The training made use of case studies to identify good practice and to develop action plans. A key feature of this training programme was the use of older people as co-facilitators. The council is also considering providing training for newly appointed front line staff working with older people.

The borough does not include age barriers in its recruitment advertisements. Staff involved in recruitment and selection receive training in how to avoid age discrimination at each stage of the recruitment process.

Hounslow also offers special leave to people who have sick dependants. Under the scheme individuals with caring responsibilities can take 5 days paid and 5 days unpaid leave. This scheme focuses specifically on the issue of caring and another scheme focuses on the issue of illness of a

relative. The council also allows individuals with caring responsibilities to vary their working hours. In one instance an employee was given six months unpaid leave to care for a relative. Annualised hours are offered in some parts of the organisation. The authority also provides staff in the final year before they retire with the opportunity to undertake training in areas related to hobbies or pastimes they would like to follow while in retirement.

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## Appendix 1

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## Appendix 2

## Methodology

The research methods used by the national experts to collect the examples of good practice contained in this portfolio were as follows:-

### *Belgium*

Almost all the case studies were obtained through a combination of a written questionnaire and a telephone interview. One case was learned of through the workshop with the social partners, while another, on initiatives on behalf of older employees in temporary staff agencies, was compiled from existing academic research.

In a preliminary phase using a stratified proportional sample (by size, province and sector) 500 companies were selected from the Employers' Register of the State Service for Social Security. Next the researchers looked up the telephone numbers under the name and address of each company. This reduced the number of companies to 311. The other 189 had either an incorrect telephone number, no number or were based abroad. After a telephone call to the responsible personnel manager written questionnaires were dispatched in a second phase in mid-March 1994. Fourteen days later a reminder was sent to all addressees. When the survey was concluded at the end of April, 114 companies had returned the questionnaire.

In January 1995 all companies which had returned the questionnaire were contacted by telephone for the purpose of interview.

### *France*

Two sources of information were used to establish the French sample: articles in specialist journals were extracted and studied over the last three years, and used to identify specific companies whose practices in managing an ageing workforce are viewed as innovative and/or positive; and an investigation was conducted into the processes of withdrawal from working life and the problems of ageing within the workplace. Research for this investigation was coordinated by Anne-Marie Guillemard on behalf of the Ministry of Employment, and was divided into two studies: a statistical study conducted in 1992 (enquiry by means of a questionnaire), and a qualitative study (six case studies on approaches to the management of ageing employees) conducted from 1993 to 1995. An important feature of the investigation was that it allowed scope for the inclusion within the sample of both smaller companies and those which recruit staff over 50 years of age. Semi-structured interviews, using a pre-designed interview guide, were then held with the personnel managers of the companies selected.

### *Germany*

In order to identify organizations which had taken appropriate measures a wide range of published literature was studied and, using the snowball principle, we contacted representatives from, *inter alia*, trade unions, employers' associations, German Federal Institutes, research bodies and individual companies. As a result of their inquiries the German researchers were able to identify 24 organizations.

Of the 19 companies which had offered training for older workers, 12 were large companies and 7 were medium-sized. Several medium-sized companies came from the processing industry, in particular mechanical engineering. In addition the German inventory includes companies from the chemicals industry, financial services and the steel industry. Construction and the wholesale trade are not represented. There were hardly any positive examples from the public sector. The companies in question have offered training programmes for older workers in response to specific internal problems relating to organizational changes and changes in the age structure of the workforce. The majority of initiatives are not part of a long-term staff development strategy. In most cases they were implemented on an *ad hoc* basis in response to sudden production changes or the introduction of new technology. They consisted primarily of age-specific training schemes applying specific teaching methods, the use of multipliers, workplace design and technology management. In addition companies sought to integrate older workers as part of their general staff development policies.

There were far fewer organizations which had offered and successfully implemented reintegration schemes for older workers. The research team were only able to identify three examples in the west of Germany and two in the east. A far greater number of employment initiatives had been promoted under the provisions of the *Arbeitsförderungsgesetz* [German legislation on employment promotion]. In so far as can be ascertained there has been very little specific action by companies themselves to promote the employment of older workers.



### *Greece*

Two main methods were used. First a list of the 1,000 largest Greek firms and enterprises was obtained from ICAP and a postal questionnaire sent to 500 of these. The public sector enterprises were, on the whole, omitted, since there are common policies and practices in relation to their employees, e.g. upper age limits for recruitment, good training practices etc. Twenty-seven enterprises responded (6 per cent), a figure that compares with the response rates from other postal surveys. Secondly a letter was published in a leading weekly economic journal describing the study and asking for employers or personnel managers to get in touch with the researchers. While it was not expected that any response would be forthcoming from employers - and indeed there was no response - it was used as a way of sensitizing employers to the issues of older workers, informing them of the work the researchers were undertaking and generally bringing up the subject for debate.

The main method used for obtaining data for the Greek portfolio was through direct telephone interviews to employers. Initially the Chamber of Commerce in Piraeus and the Federation of Small and Medium sized Employers, representatives of which had originally attended the workshop, were asked for contacts among smaller employers particularly where they thought positive human resource management was common. This provided very few useful cases since the active involvement of an employer in the above organisations did not necessarily mean that they had positive policies for their workers. A selection of companies was made from the original list of larger employers, both those to whom questionnaires had originally been sent and those where this was not the case. Attempts were again made to ensure representation of different types of manufacturing and service businesses. A further useful source of information was from some personnel officers who occasionally suggested other employers with whom they were familiar who they believed had positive employment practices for their older workers.

Subsequent to the telephone interview in which positive policies and practices were identified, the company was sent a copy of what had been written and asked to make any amendments. Employers were also asked if they were willing to have their name mentioned in the portfolio; three employers did not want publicity for different reasons but were agreeable to letting the case study be described in the portfolio. In total over 100 telephone interviews were made.

One significant difficulty was identifying what can be considered as positive employment policies in Greece. The overwhelming majority of employment is in small and very small businesses, nearly always personal and often run on a family basis. In such cases identifying examples of positive policies e.g. in recruitment and training, were very difficult. This does not mean that small employers in Greece have negative policies towards their older workers but that the size of the operation, the usual pattern of recruitment through family and friendship, and the lack of training courses in such businesses makes it difficult to use them as examples of consciously selected 'positive' policies and practices. Thus small employers are underrepresented in the portfolio even though in practice they provide a lot of employment to older workers.

More generally Greek employers vary enormously in terms of their systems and consciousness of human resources management, their investment in training, the specific skills required in their enterprise and the degree to which they find it easy or difficult to recruit staff at different levels. Awareness of the developments in their field of enterprise and the labour market made some employers and personnel managers much more responsive to the researcher's enquiries as well as to the benefit and use of a national report including the portfolio of initiatives. Thus it is probably the case that some of the employers/companies and initiatives selected for the portfolio are not necessarily radically better or different or even outstanding in terms of their actual policies and practices but were those who responded more positively and represented themselves as far more conscious of age management issues and the benefits of employing older workers.

While the portfolio includes a selection of those employers contacted who reported positive policies and practices, hopefully there are many more cases of employers in Greece who exercise positive employment policies for older workers. Although 21 cases were described in the Greek report few have specific initiatives for older workers.

### *Italy*

The methodology employed to carry out the national review of measures aimed at promoting employment opportunities and professional development for older employees consisted of three phases.

The initial research phase involved using the 'snowball' method to make contact with representatives of:

- employees' national and regional associations (belonging mainly to the CGIL, CISL and UIL Confederations) and employers' associations (linked mainly to Confindustria, Confcommercio, Confartigianato and Coldiretti);
- public bodies responsible for employment and training both at national and regional/provincial level (Ministry of Employment, Isfol, Employment agencies, regional/provincial employment offices, regional/provincial professional training services);
- non-profit-making organizations (including the CGM National Study Centre, the National Association of Senior Citizens);
- socio-economic research institutes (university departments, public research institutes and foundations);
- associations specializing in professional training for older employees.

To ensure that the study covered the whole country, contacts with the various regional bodies were made by selecting three regions in each geographical area into which the country was subdivided, namely: Trentino Alto Adige, Veneto, Emilia Romagna for the north-east; Lombardy, Piemonte, Liguria for the north-west; Tuscany, Marche, Lazio for the centre; Campania, Calabria, Sicily for the south and the Islands.



The information obtained from this initial enquiry enabled a workshop to be organized and an initial grid to be constructed of approximately 100 potentially positive measures for the employment and/or training of older workers. After being contacted by telephone, all in this group were sent a postal questionnaire which asked for detailed information on both the organization's structure and the measures geared towards the older workforce.

The response rate was over 50% (58 questionnaires returned). Despite numerous efforts the remaining organizations could not be persuaded to participate, mainly because they were not interested in the aims of the research. During the detailed examination and compilation of the information collected, 40 initiatives were excluded, as they did not adequately fulfil the research criteria. A total of 17 measures were therefore identified as examples of positive action in the case of Italy. Seven of the measures are aimed at older employees in individual companies and the others deal generally with the older workforce as a whole: the majority of the latter measures (7) were promoted by regional public authorities. The operational research was carried out in November 1994 and completed in June 1995.

### *The Netherlands*

The examples came from one of three sources. Firstly a number of companies were selected on the basis of existing survey reports and/or publications in the daily or weekly press. Secondly, a number of professional organisations and individual experts were asked to suggest potentially useful examples. Thirdly, a number of examples were added to the collection through the 'snowball effect'. The Dutch team's search for possible examples of good age-related policy was also guided by the need for a certain spread according to nature of initiative, region, type and size of the organisation and any specific target group. In addition they looked not only at initiatives aimed at an organisation's own staff, but also included examples of organisations targeting (specific groups in) the labour market.

In this way a preliminary collection of some 50 organisations in all was assembled. These organisations were then sent a written questionnaire. The forms completed by the organisations themselves were subsequently supplemented and corrected by telephone. A number of the organisations turned out, on closer inspection, to be scarcely involved with age-awareness policy and were removed from the list. A number of organisations were also eliminated because the information given was insufficient or incomplete.

For the purposes of the national report a total of 26 organisations were selected from the complete list for a short description. In choosing the 26 practical examples, in accordance with the guidelines for the international research project, the emphasis was mainly on the first two themes in age-related policy: recruitment and selection and education and career development. Since it emerged from the survey that in many organisations it was not so much a question of choosing a single theme, but rather of a more comprehensive, integrated age-related or personnel policy, of which recruitment, training and career development were components, a number of such examples of integrated policy have been described.

### *United Kingdom*

The UK portfolio of employer initiatives was prepared primarily from the transcripts of interviews with employers which were conducted in 1992/93. These employers were chosen from among face-to-face interviews with 100 employers conducted as a follow-up to a national postal survey of 500 employers of more than 500 employees (although redundancy programmes had significantly reduced this number in some cases) (Taylor and Walker, 1994). (The original survey was funded by the Economic and Social Research Council and the Department for Education and Employment contributed towards a further analysis of the survey results.) This sub-group comprises a range of employers, from those which had in place policies which aided the recruitment and retention of older workers through to employers whose policies either deliberately or inadvertently excluded older workers. Employers were asked a range of questions about their policies and practices towards older workers and from these the researchers were able to build a comprehensive picture. In several cases the existing data has been supplemented by telephone interviews.

The 30 UK vignettes are of organisations which showed at least some degree of orientation towards older workers. Employer's policies range from the comprehensive, where management have invested considerable resources into promoting older workers within the organisation, to the very basic where, for example, age bars might have been dropped from recruitment advertisements but policies have not developed elsewhere. The range of examples covers employers whose policies are of a general human resource type but which, nevertheless aid older workers, through to those organisations that have developed specific older worker policies.

Where specific age management policies exist these tend to focus on recruitment. For example, most employers in this group do not include age restrictions in job advertisements. On the other hand, phased retirement policies are rarely in operation and, although many organisations offer some flexibility in the age at which employees retire, this is usually at the discretion of the employer.

Some employers targeted older workers when it came to redundancy, through offering enhanced redundancy packages, and were not aware that this might constitute age discrimination although the majority were aware of the inherent contradiction of having a policy on older workers and encouraging them to leave the organisation. One employer now uses compulsory redundancy and deliberately avoids voluntary redundancy.

Most of the organisations in this group do not exclude older workers from training courses and a few were deliberately targeting older workers in providing 'mature' apprentice schemes. Older workers are often involved in appraisal schemes. A few employers have developed training programmes aimed at re-entrants. A minority of employers operate schemes offering extra leave to those with caring responsibilities. Flexibility in working hours is also offered and this has also been linked to a job-share scheme. Only one organisation in this group is in the process of re-designing jobs in order to make them easier to perform.



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<sup>1</sup> See footnote 1 on page 8

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Table 3

SIZE	SMALL <100	○
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	LARGE 500+	●
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	PRIVATE	▤
	NOT FOR PROFIT	■

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	1.7	other
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	2.3	creation of learning environment and workplace mentorship for older workers
	2.4	career development
	2.5	evaluation of performance
	2.6	promotion of age-specific policy in work organisations
	2.7	other
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	3.6	part-time jobs
	3.7	flexible retirement/early exit scheme
	3.8	gradual retirement scheme/part-time 'early exit'
	3.9	self regulation pace
	3.10	other
IV Ergonomics, Job Design and Prevention	4.1	ergonomic measures/improvement work conditions/workload
	4.2	organisation of tasks
	4.3	mix of young and older workers
	4.4	age related health and/or wealth control
	4.5	older workers excluded from shift labour
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# Combating Age Barriers in Employment: A European Portfolio of Good Practice

The positive management of an ageing workforce presents a new, if necessary, challenge to governments, employers and to workers themselves in the European Union. This report provides illustration and analysis of more than 150 initiatives in favour of the retention, retraining and reintegration of older workers. It is intended as a practical tool for all those concerned with developing practice or supportive policies to combat age barriers in employment.

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