



# MoPAct

Mobilising the Potential of  
Active Ageing in Europe

## EXTENDING WORKING LIVES

### REPORT ON CASE STUDIES

## WORK PACKAGE 3 | TASK 3

JÜRGEN BAUKNECHT AND GERD NAEGELE

WITH THE SUPPORT OF

MIKKEL BARSLUND | CARINA BÖSSING | KATRIN GASIOR | NATHAN HUDSON-SHARP | VERONIKA KHÝROVÁ  
KATJA LINNENSCHMIDT | ELISA MARTELLUCI | JULIJA MOSKVINA | LIINA OSILA | ANA RINCON-AZNAR AGNÈS  
ROMANINI | MARCO SOCCI | IZABELA STYCZYŃSKA | LUCIE VIDOVIČOVÁ | ESZTER ZOLYOMI

OCTOBER 2015



Research for this paper was conducted as part of MoPAct, a four year project funded by the European Commission under the 7<sup>th</sup> Framework Programme to provide the research and practical evidence upon which Europe can begin to make longevity an asset for social and economic development. The paper is also published on the MoPAct website ([www.mopact.group.shef.ac.uk](http://www.mopact.group.shef.ac.uk)) as Deliverable 3.3. See the website and the last page of this paper for more information of the project.

# Contents

- 1 Introduction and summary..... 3
- 2 Health ..... 11
  - 2.1 Health promotion ..... 11
  - 2.2 Work despite health problems..... 39
- 3 LifeLong Learning..... 50
- 4 Work after retirement age ..... 77
- 5 Flexible working times..... 86
- 6 Reconciliation of paid work and family ..... 99
- 7 Unemployment..... 110
- 8 Self-employment ..... 120
- 9 Awareness Campaigns..... 128
- 10 Recruitment / labour demand..... 131
- 11 References ..... 135
  - 11.1 MoPAct | WP3 | Task 3 | Case Studies ..... 135
  - 11.2 Other references ..... 136
- 12 Appendix: Guidelines for Case Studies ..... 138

# 1 Introduction and summary

## (1) Objectives

This report is based on in-depth case studies conducted in MoPAct work package 3, task 3. The selection of cases is based on a collection of more than 130 best practice cases created in task 2, which can be found under <http://mopact.group.shef.ac.uk/research-posts/findings-5/>. This collection provided a large number of vastly transferable best practice cases serving as a library of imitable measures. Further, the selection served as a starting point for the selection of cases for in-depth case studies presented here. Selection criteria had been (1) degree of (social) innovation (2) estimated positive impact (in the sense of sustainability) and (3) transferability.

In-depth case studies provide in-depth information on the implementation, functioning and transferability of measures aimed at longer working lives or measures contributing to longer working lives. Extending working lives and raising the employment rate of older workers, aided by lifelong learning, are key responses to the demographic and welfare challenges of an ageing workforce. MOPACT's work package 3 is aiming at identifying innovative, effective, sustainable and transferable private and public sector strategies that encourage and enable older workers (1) to stay longer in employment (pre & post retirement age) and (2) to intensify lifelong (vocational) learning (LLL). The overall MoPAct proposal requests wp3 to focus on two levels: (1) approaches at organisational/employer level and (2) the level of national policies and stakeholders (including social partners) "in different welfare regimes in the EU and outside". This report is focused on (1).

The report is based on 20 in-depth case studies and one summary of measures of 16 companies in one sphere of activity. The case studies were conducted in Belgium, the Czech Republic, Denmark, Estonia, Germany, Italy, Latvia, Lithuania, the Netherlands, Spain and the UK.

## (2) Procedure

Partners selected cases fulfilling selection criteria mentioned in the chapter above. In order to cover a wide range of measures and a wide range of companies/organisations, this took place in co-ordination with the work package leader. The conceptual framework (inner circles in figure 1 on page 10, <http://mopact.group.shef.ac.uk/wp-content/uploads/2013/10/Extending-working-lives-conceptual-framework.pdf>) provided overarching criteria for the balance of topics: Social innovation, the different dimensions and in particular the multi-complexity of (the concept of) employability, life course orientation, work-life balance, quality of work and life, good practice, age management, mixed strategies, comprehensive approaches.

In order to ensure coverage of relevant questions, with assistance of partners the work package leader designed guidelines for the case studies to be conducted (see appendix for the guidelines). The guidelines refer to case studies reports' content. A basic guideline has been that face-to-face interviews have to be conducted for in-depth case studies.<sup>1</sup> For these interviews partners adapted the guidelines to cases' specific characteristics and translated questions into interview languages. Interview partners have been informed on the project as well as on anonymity issues: Depending on the company/organisations' preferences, anonymity could be

(a) guaranteed on company/organisation level (identity of company/organisation left opaque since name left out and characteristics revealed in manner disallowing for identification)

(b) on interview partner level (identity of company/organisation revealed but identity of interview partner remains opaque due to the use of vague phrases such as "HR department". Lastly, of course

(c) companies/organisations resp. interview partners could relinquish anonymity

### **(3) Social innovation**

A crucial aim of MoPAct work package 3 is to find socially innovative solutions. As laid down in the conceptual framework (chapter 4.2), social innovation is "...a term that almost everyone likes, but nobody is sure what it means" (Pol/Ville 2009: 881). Social innovation "can be defined as the development and implementation of *new* ideas (products, services and models) to meet social needs and create new social relationships and collaborations..." (European Commission Guide to Social Innovations, 2013: 6, emphasis added). Social innovation is about "finding acceptable *progressive* solutions" (Moulaert et al. 2010: 14, emphasis added), and "social innovation is about collaboration...its success requires multiple stakeholders to work together" (O'Sullivan et al. 2010: 1, 11). "Social innovation activities are often started at local level, meeting specific unmet needs..." (European Commission Enterprise and Industry 2010). As Totterdill et al. (2012: 241f.) note,

"social innovations at the workplace should aim at both: good for the sustainable competitiveness of the enterprise and good for the well-being of employees (...) most importantly, workplace innovation is an inherently social process. It is not about the application of codified knowledge by experts to the organisation at work. Rather it is about building skills and competence through creative collaboration. Workplace innovation is about open dialogue, knowledge sharing, experimentations and learning in which diverse stakeholders including employees, trade unions, managers and customers are given a

---

<sup>1</sup> Based on the finding that "with more complex [open] questions, the assistance and probing of an interviewer is necessary to get more detailed answers" (de Leeuw 2005: 245 based on de Leeuw 1992 which in turn is based on a meta-analysis of 67 articles and papers reporting mode comparisons). Face-to-face interviews are superior to other modes when it comes to interviewers' ability to probe.

voice in the creation of new models of collaboration and new social relationships (...) with an emphasis on employment and engagement”

These quotations neatly mirror the concept’s complexity. As laid down in the conceptual framework (chapter 4.2), for work package 3 social innovation is defined as

“an intentional, purposeful *new* configuration of social practices realised by a certain group of stakeholders respectively constellations of stakeholders whose objective is to solve socio-political problems or satisfy needs better than it would be possible on the basis of established practices. This means that it is about the founded and explicitly intended integration of various constellations of stakeholders and practices into new socio-political methods of operation and organisation” (emphasis added)

Out of the criteria considered suitable to identify social innovations (Heinze/Naegele 2012: 153ff.) we found the following suitable for defining social innovation in corporate age-related HR measures:

- New solutions in the sense of a real understanding of newness
- Specific new configurations of social practices/arrangements
- Integration/co-operation of heterogeneous players that usually do not (have) co-operate(d)
- Integrated patterns of action
- Integration of end-users (“user co-production”)
- Reflexivity and interdisciplinary approaches
- Sustainability of measures (in the sense of social practice/facts)
- New growth potentials in terms of regular employment

Prior to a detailed description it should be noted that the term ‘social innovation’ is understood differently in different countries. There is no common comprehension of social innovation. In the “early mover countries” – defined as countries with a longstanding tradition of age management – innovative measures are closer to the classic definition of innovation including unique social inventions never put into practice before, whereas in “late mover countries” – understood as countries with no long-lasting experiences with older worker-policies - social innovations are closer to the wider definition including measures put into practice before elsewhere – albeit always at least slightly differently – but not put into practice in the specific context.

Numerous measures depicted in this report reveal that innovation and best practice are partly used synonymously and that a clear differentiation is not always possible.

Noticeably in some cases (e.g. PARP in Poland, WdBT in the Czech Republic, InfraLeuna and Sozialholding in Germany in the past) EU funding had been used for the implementation of socially innovative measures. On the one hand this is an indicator of successfully taken up targeted funding, that is, social innovation happened (also) due to external EU-incentives. However, on the other hand in one case a HR department will refrain from applying for EU funding in the future due to complicated and too bureaucratic procedures in applying. . With respect to such cases, it is possible that (better) consultation (especially of SMEs) on application for EU funding (or less complicated/bureaucratic procedures) could be useful. Yet, while it is possible that temporary funding leads to measures which would not have been implemented without funding, it is also possible that these measures' sustainability is endangered due to external funding's temporality. Partners reported repeatedly about cases, in which measures being introduced on grounds of fundings have been stopped after the period of funding ended.

In addition, also legislation on the macro level can trigger social innovation at the meso level. For example, the Italian 'Fornero reform' (see National Policy Report, page 78) increasing the legal retirement age has contributed to innovative measures at company levels. Similar effects can be seen or expected in other countries, for example in the wake of raising the official retirement ages in many European countries, the abolishment of the default retirement age in the UK or the introduction of a flexible retirement age corridor (63-68) in Finland, or from expanded possibilities to combine pension receipt and paid work.

Albeit (1) degree of (social) innovation (2) estimated positive impact (in the sense of sustainability) and (3) transferability are selection criteria for measures reported here, fulfilment of all three criteria is not to be equated with social usefulness. Social usefulness, in turn, contributes to sustainability.

We define newness context-specific, resulting in context-specific requirements for measures to be defined as "socially innovative". The relevant context can be the sector, the country and the company/organisation size. The latter is caused by different preconditions for different companies/organisations of different sizes, resulting in a special focus on SMEs since

- (1) their capabilities are more restricted compared to large enterprises and
- (2) their total number of workers is high.

Large companies have the advantage of sizeable HR departments with according specialisation, resulting in both better preconditions to implement innovative measures as well as in (intended or unintended) longer working lives. Yet, our case studies suggest that also SMEs can conduct far-reaching, sustainable and impressive socially innovative measures, even without considerable resources compared to larger companies. Possibly leadership is the crucial factor in SMEs making the difference between companies/organisations with and without noteworthy measures worthy to be reported here; outside of leadership companies

with and without remarkable measures are probably widely similar. 'Leadership' can be a constellation of actors, yet in numerous cases innovative measures can be traced back to a single person, e.g. the CEO or the head of the HR department,

SMEs have the disadvantage of smaller and probably less professionalised HR departments. On the other hand, some experiences with case studies suggest that close and informal contact between crucial actors – HR departments, CEOs, workers' representatives – are one advantage of SMEs when compared to large companies. Experiences suggest that key actors' attitudes are one crucial determinant for the existence or absence of best practice measures. To inform and to convince these key actors could be expedient.

Further, there is the role of collective agreements: Partially these agreements provided the impetus for measures that developed in best practice measures, for example in the case of InfraLeuna with measures by collective agreements in the chemical industry.

It is not clear to which degree measures depicted were designed and implemented as top-down measures, or to which degree employees' needs or expressed preferences gave the initial spark.

### *Sustainability*

Possibly (meso level) measures on company/organisation level have one important advantage over (macro level) policies:

Policies often create winners and losers. Primarily in the case of financial incentives, policies aimed at longer working lives lead to workers who either have to delay retirement (against their preferences) or who have to accept financial losses. Both could be unpopular. This applies to several important welfare policy fields such as pension, unemployment and disability schemes. The (unavoidable) 'losers' either adjust their preferences to the new status quo or will try to roll back these policies (via the democratic process or other means). This endangers the sustainability of these policies.

In contrast, company/organisation level measures often result in a 'win-win' situation (at least subjectively). Several measures would not have been implemented to begin with if not all relevant actors would have expected net gains. If all relevant actors are content with measures, probability of reversal is low. At least as long as there is no staff turnover amongst crucial actors.

Measures on both levels (macro and meso) gain sustainability due to (the cultural dimension of) path dependence: Individuals tend to adapt to the status quo and therefore consider reversals unattractive (Pierson 2002).

Not all measures beneficial to employers are beneficial to employees. This applies for example to the substitution of jobs subject to social security contributions by (fake) self-employment, e.g. in work relations after retirement.

#### **(4) Spheres of Activities**

In the following, some outstanding (socially) innovative measures in the 9 spheres of activity depicted in the report are summarised. Mostly they refer to relevant dimensions of *workability* and *employability*. They all stand for measures which fulfil – following the evaluation of our partners and mirroring different levels of understanding the concept of social innovation – the three starting research criteria. As mentioned earlier, the differences between “good practices” and “social innovation” sometimes are not clear-cut.

**Retaining and promoting health:** Measures by the company InfraLeuna (DE) are noticeable, especially in the field of sports: Swimming for shift workers (with adjusted opening times), encouragement of workers to take part in a local marathon run and an on-site football league. Against the country specific backdrop (companies not obliged to provide health insurance for employees), the company Rimi (LV) provides health insurance to its employees (as other companies do), and after 15 years of tenure very good health insurance. Further, once a year employees can get reimbursed by the company for new glasses (if glasses are prescribed by the doctor). At ServiceTeam Nyborg (DK), the measure ‘Early action’'s main goal was to spot physical or psychological problems at the workplace at the earliest possible time, before these problems can develop further. ServiceTeam is a very interesting case, also due to the target group (cleaners) and the problems that emerged (e.g. distrust on the side of employers and the view that employees’ health is not the employer’s business).

**LifeLong Learning:** The Experience Certificate (NL) targets the problem of skill measurement and skill certification, also including skills learned on the job. The Certificate is standardised and informative and increases (employed and unemployed) workers to find new employment. A noteworthy example of local cooperation of numerous employers can be found at Confindustria Veneto (IT).

**Work after retirement age:** At Sozial-Holding (DE) workers in transition to retirement can get a talk with the CEO who is encouraging them to work past retirement age, possibly with a mini-job. More than half of the staff accept the job opportunity, which can be in the current task or in a different field. At Elis (LT), a very small electric company group, a considerable share of employees works past retirement age, with adjusted tasks. Remarkably, this happens in a physically harder job in a country with below-average health status.

**Flexible working times:** Queen Alexandra College (UK) offers its employees a very wide array of instruments of flexible working times, also compressed working hours (long days, but less days in return) and annualised hours (some flexibility about the timing of the hours to be worked in the year). Of course, this is transferable only to a limited array of occupations. Asda (UK) offers up to 5 days/12 weeks/18 weeks (depending on the programme) days of unpaid

leave per year; the programme 'my health' offers reasonable time off to attend medical appointments and donations.

**Reconciliation of paid work and family:** This area is related to the preceding one. North Warwickshire Borough Council (UK) offers 'Carer's Leave'. Employers registered as carers with their line manager and HR can save up to two weeks of working time (so the number of hours depends on the number of contracted working hours), and take off for emergencies or planned hospital visits. Generally this is limited to three weeks per year, yet can be extended if the line manager agrees. perbit Software and Fraport (both DE) allow their workers to shift to part-time jobs temporarily.

**Unemployment:** GO 50 GO (CZ) is focused on older long-term unemployed with tertiary education, a group with very low re-employment probabilities. The project initiates contacts between the target group and HR managers/employers, and improves the long-term unemployed person's knowledge about the labour market and their self-confidence and self-presentation. All participants are volunteers. Speeddates (NL) events match older jobseekers and employers; the events are organised locally by local actors. It has shown to be a good idea, yet forcing jobseekers to participate can be considered useless.

**Self-employment:** Self-employment is related to (the prevention of) unemployment. The association RCP (PL) supports potential entrepreneurs with training, information and microloans and promotes entrepreneurship in general, especially in market niches. The project 'We do business TOGETHER' (CZ) is similar in some respects and provides training (e.g. communication, computer use, business law, business plan creation, marketing) and personal coaching by specialists. The project shows that in some cases follow-up projects are necessary for sustainability, in order to sustain support of actors and/or to evaluate outcomes.

**Awareness campaigns:** Awareness campaigns are a double-edged sword, since on the one hand these campaigns can improve some groups' reputation (e.g. by showing employers that productivity does not necessarily decline with age), but on the other hand these campaigns can raise suspicion, since target audiences may ask themselves about the reasons behind these campaigns' necessity. The report has only one example of awareness campaigns. Confindustria Veneto (IT) organised focus groups with a high number of different and important stakeholders from business, science, training, consulting and local public bodies. Awareness was focused on various issues, such as further training, economic developments (tertiarisation), the region's economic strengths, new business areas, age discrimination and specific older worker issues.

**Recruitment / labour demand:** PARP (PL) organises free webinars and conferences for HR managers and employers in order to encourage them to hire older workers. Sozial-Holding (DE) is encouraging older workers to apply.

## Case studies: Author affiliations

MIKKEL BARSLUND: CEPS – CENTRE FOR EUROPEAN POLICY STUDIES (BRUSSELS, BELGIUM)

JÜRGEN BAUKNECHT: TUD/FFG – INSTITUTE OF GERONTOLOGY AT TU DORTMUND UNIVERSITY (DORTMUND, GERMANY)

CARINA BÖSSING: TUD/FFG – INSTITUTE OF GERONTOLOGY AT TU DORTMUND UNIVERSITY (DORTMUND, GERMANY)

KATRIN GASIOR: EC - EUROPEAN CENTRE – EUROPÄISCHES ZENTRUM FÜR WOHLFAHRTSPOLITIK UND SOZIALFORSCHUNG (VIENNA, AUSTRIA)

HUDSON-SHARP, NATHAN: NIESR - NATIONAL INSTITUTE OF ECONOMIC AND SOCIAL RESEARCH (LONDON, UK)

VERONIKA KHÝROVÁ: MASARYK UNIVERSITY (BRNO, THE CZECH REPUBLIC)

MARIJA KRUMINA: BICEPS – BALTIC INTERNATIONAL CENTRE FOR ECONOMIC POLICY STUDIES (RIGA, LATVIA)

KATJA LINNENSCHMIDT: TUD/FFG – INSTITUTE OF GERONTOLOGY AT TU DORTMUND UNIVERSITY (DORTMUND, GERMANY)

ELISA MARTELLUCI: CEPS – CENTRE FOR EUROPEAN POLICY STUDIES (BRUSSELS, BELGIUM)

JULIJA MOSKVINA: LSRC – LITHUANIAN SOCIAL RESEARCH CENTRE (VILNIUS, LITHUANIA)

LIINA OSILA: PRAXIS – PRAXIS CENTER FOR POLICY STUDIES (TALLINN, ESTONIA)

ANA RINCON-AZNAR: NIESR - NATIONAL INSTITUTE OF ECONOMIC AND SOCIAL RESEARCH (LONDON, UK)

AGNÈS ROMANINI: INRCA – NATIONAL INSTITUTE OF HEALTH & SCIENCE ON AGEING (ANCONA, ITALY)

MARCO SOCCI: INRCA – NATIONAL INSTITUTE OF HEALTH & SCIENCE ON AGEING (ANCONA, ITALY)

IZABELA STYCZYŃSKA: CASE – CENTER FOR SOCIAL AND ECONOMIC RESEARCH (WARSAW, POLAND)

LUCIE VIDOVIČOVÁ: MASARYK UNIVERSITY (BRNO, THE CZECH REPUBLIC)

ESZTER ZÓLYOMI: EC - EUROPEAN CENTRE – EUROPÄISCHES ZENTRUM FÜR WOHLFAHRTSPOLITIK UND SOZIALFORSCHUNG (VIENNA, AUSTRIA)

## **2 Health**

### **2.1 Health promotion**

#### **Best practice example 1: Wojewódzki Ośrodek Ruchu Drogowego (WORD), Poland**

Wojewódzki Ośrodek Ruchu Drogowego (WORD), Poland, an independent entity, is one of the many regional centers dealing with driving education. Created in 1998, the regional center of Olsztyn (voivodship of Warmia and Masuria) deals with the following tasks: drivers' tests trainings, theoretical and practical drivers' tests examinations, trainings for drivers transporting dangerous materials, trainings for drivers whose driving license has been seized by the police, trainings for school teachers providing road safety courses, trainings for people preparing an application for a taxi license, and first aid courses (WORD does not provide courses for people preparing their driving license).

Since 2003, WORD has the status of Regional Center for Traffic Safety with the aim of monitoring and coordinating activities improving road safety. Being a public unit, it is not subsidised and it cannot use profits resulting from its activities for other than public purposes.

WORD currently employs 66 people – 43 men and 23 women. Men are usually employed as examiners and diagnosticians, which are traditionally male professions, while women rather perform administrative tasks. 65% of all employees are aged 45+.

#### **Best practice example 1: Description**

WORD implements 15 minute- breaks – included in the worktime – devoted to gymnastics exercises. The office complex offers a recreation room with a ping pong table, which can be used by the employees and their families outside of working hours. The employees can also benefit from a wide range of social funding which includes subsidised holidays, financial help in case of long-term health issues or difficult financial situations which can be additionally improved by taking low-interest loans.

Once every two years, employees must undergo medical exams. Women over 50 years of age are offered mammography exams and men are offered prostate exams as well as specific blood exams. Once a year, the employees – especially the older ones – are vaccinated against the flu, and the employees spending the majority of their worktime in front of the computer screen are offered eyesight tests.

The future plans of WORD Olsztyn in the context of the implementation of elderly-friendly policies is the provision of additional medical care for all employees, but especially the older ones. This medical care would be available 24/7 and would offer quick and efficient access to specialists and services such as rehabilitation. The HR Manager plans to implement this

initiative preferably at the beginning of 2016, but this depends on the availability of funds, which means that the implementation of this initiative could be postponed.

### **Best practice example 1: Implementation**

With 65% of employees aged more than 45, among which almost 20% are over 60 years old, the HR department at WORD are aware of the need for specific policies adapted and addressed to the elderly. Indeed, HR listens to the needs of older employees and creates measures accordingly. They pursue yearly surveys among the workers in order to assess their needs, and propose a “box of ideas”, in which every employee can put ideas about initiatives improving their day-to-day life in the workplace.

The driving forces of the elderly-friendly policies initiatives reside in both the employees’ engagement and the HR strategy, committed to the recruitment of older people and to offering good working conditions for the elderly.

From the side of the company’s management body, while young workers bring energy and fresh views to the company, older workers are valued as a source of experience and wisdom. Indeed, the older workers’ experience is precious for the company.

Furthermore, the older ones are not the ones with the most sick days: workers under 45 years old are equally likely to go on sick leave than the ones over 50 years old.

WORD’s equal treatment policy proves itself in practice. Older employees are not seen as being a category of workers to be treated differently than others. Special treatment is considered negative, such as exclusion and isolation of the older workers’ group, favouritism, and discrimination of the younger workers’ group. Moreover, equal treatment and intergenerational collaboration reduce the prevalence of age stereotypes.

According to the HR manager, the barriers that rise against the positive evolution of elderly-friendly policies imply three kinds of restrictions: legal restriction, financial limitations – quoted as the main barrier – and restrictions linked with the workers’ state of mind.

First, legal restrictions linked with national labour law may occur as the proposition of flexible working hours is not a typical company policy in Poland and their implementation is not always easy.

Second, financial limitations can be considered another barrier to the implementation of elderly-friendly policies at WORD: The Social Fund (Zakładowy Fundusz Świadczeń Socjalnych) – which is an institution providing funds for social initiatives in the workplace – provides a limited amount of funding. If the project costs exceed the budget, there is an addition of costs – namely taxes – that have to be handled by the company, or that need to be completed by the employees.

The third restriction that can be observed involves the employees' state of mind: Motivation, the wish for change, and engagement into action. If there is a lack of these elements amongst employees, constructive policies cannot be implemented. It is also worth noting that the workers' state of mind is also linked to the lack of rivalry or competition between the generations. Indeed, intergenerational collaboration can be perceived by the older generation as a threat, as they might be afraid that they will be ousted by younger workers once they taught them everything they know.

Interestingly, the drivers of the elderly-friendly policies at WORD are the same as the barriers: available funds, adapted legal framework and a positive state of mind among the older workers are driving their development.

### **Best practice example 1: Transferability**

Given the positive outcomes of the measures taken by WORD in the field of health, some of their aspects are transferable to other companies and even to other countries. However, the initiatives put in place by WORD and which concern the provision of special access to medical care facilities necessitate specific infrastructure as well as funding or co-funding. Therefore, this aspect of the initiative is transferable only case by case.

### **Best practice example 1: Innovation**

The project can be assessed as innovative in the Polish landscape from the perspective of active ageing, as it is really focused on the moral and physical well-being of older workers in the workplace, which contributes to extending working lives. In the particular area of health, few Polish companies take the initiative of implementing such policies, since the country's companies have not yet developed active ageing programmes on a wide scale.

### **Best practice example 2: UniCredit Group, Italy**

UniCredit Group is a leading European commercial bank operating in 17 European countries with 146,000 employees (58% males; 42% females), 8,400 branches (48% in Italy) and with an international network covering about 50 countries. Its extensive presence and market leading position in Europe gives the group one of the region's highest market shares (e.g. in terms of total revenues, assets, number of customers, loans, etc.). The banking group was founded in 1999 and its origin is the result of the merging of seven of Italy's largest banks and the subsequent combination with some European banking groups and other important Italian banks. UniCredit Group includes a broad international network of banking, financial and instrumental companies directly and indirectly controlled by the holding UniCredit S.p.A. The latter, located in Italy, has its registered office in Rome, its headquarter in Milan and, concerning the organisational structure, its network is articulated in around 4,000 branches,

spread in 7 company's "Regions" (i.e. North-West; Lombardy, North-East; North-Central; Center; South; Sicily), including several company's local "districts".

The proportion of older workers employed by UniCredit Group is high and increasing: between 2013 and 2014 the share of employees 50+ has grown from 23.7% to 27.6% among the total group's workforce and from 37% to 40.3% within the holding company. The Italian overall employees (i.e. 43,000 workers of UniCredit S.p.A. plus employees of the companies controlled by the former and belonging to the Italian network of the UniCredit Group) are around 50,000 (one third of the total group's workforce), of whom more than 10,000 are 55 years old or older (i.e. 20% of the total workforce of the company in Italy). In this context, in Italy the high proportion of older employees and the further ageing of the company's workforce expected in the near future mainly due to the effects of the last pension reform (the Fornero reform increased legal retirement age, see also National Policy Report under <http://mopact.group.shef.ac.uk/research-posts/findings-5/>), are issues requiring innovative HR management strategies and specific initiatives. In the light of the above, the focus here is on initiatives targeting older employees implemented by the company (under the coordination of the holding UniCredit S.p.A.) in its Italian network.

### **Best practice example 2: Description**

UniCredit offers to older workers, and to all employees in general, a range of welfare services aimed to promote their wellbeing (e.g. counseling), some of them useful for health prevention. In this regard, the most relevant measure available is the so called "UNICA", a company's health care insurance covering expenses incurred by the workers for various health needs. Furthermore, through the health care services made available by the company through "UNICA", workers may have the possibility to undergo preventive check-ups, specialist medical examinations, etc. According to some interviewed people, these health measures are considered very useful, even though, especially older workers think that it could be helpful to simplify some bureaucratic procedures (often considered quite complex) to access health care services provided by "UNICA".

### **Best practice example 2: Implementation**

Implementation of all UniCredit Group measures:

Main driving forces of the initiative have been UniCredit's top management (i.e. CEO and Head of personnel), the Change Management Unit (in particular the head of such Unit), Human Resources professionals and company unions. They have promoted a shared strategy in order to cope with the effects of the last pension reform on the banks' older workers, enhancing their role within the company and improving their work motivation and working conditions.

Driving forces were the CEO, the Head of personnel, the Change Management Unit (in particular the head of such Unit), Human Resources professionals and company unions. Through a wide internal involvement of different company's organisational functions/areas/working groups, UniCredit was able to promote the 'Being Senior in UniCredit' project in a synergic way, encouraging a greater awareness on the important issue of managing the ageing workforce within the company. Another key factor for the success of the project was the realisation of an initial survey among older workers. According to the results concerning their needs and expectations, the specific initiatives have been designed and implemented. By taking into account these needs and expectations, "Being Senior in UniCredit" promoted a higher quality of work, providing concrete tools for the enhancement of older workers, who have been understood as a value for cultural and organisational change within the company, for the benefit of the organisational work climate and of the company efficiency, including employees' motivation to work.

The design and the implementation of the "Being Senior in UniCredit" project and related measures have been coordinated by the Change Management Unit of the holding UniCredit S.p.A., involving various internal units of the company (e.g. HR; training; sustainability group; press, media and communication area), company unions, plus experts (i.e. an academic and former Minister of Labour and Social Policies) and an external scientific partner (the "Brodolini Foundation").

Moreover, interviewed people stressed the fundamental driving force played by the choice of carrying out a survey among older workers, in order to highlight needs and expectations of this working group, before defining in detail the specific measures to be implemented by the project. Company's unions had a key role in supporting the project from the beginning, in encouraging the participation of older workers to the survey and in cooperating to the design of the concrete measures (e.g. training) to be implemented. The company unions have stipulated a union agreement with the employer (i.e. UniCredit) at the company level, for sharing with the latter aims, contents and specific activities of the "Being Senior in UniCredit" project.

Interestingly, initially this initiative was called "Over 55 – Being Senior in UniCredit", but older workers involved in the first stages (i.e. survey, some measures implemented after the survey) criticised this denomination, and in particular it led to susceptibility of such workers. Indeed they thought to be contacted for participating in the project because the company considered them "old", but most of them did not accept this idea, since they believed that at their age to be considered old was a stereotype. According to this, the company, which recognised that maybe in the launch of the initiative some "communications failures" were made (i.e. UniCredit had absolutely no intention of fostering the spread of age-related stereotypes), decided to change the name of the project.

Apart from this, "Being Senior in UniCredit" has been funded by a tender for funding lifelong learning and specifically aimed at updating, retraining and valuing older workers (55+). It was a tender promoted by the "Banks Insurance Companies Fund" (FBA), the National Inter-

professional Fund of employees and employers operating in the Italian Credit and Insurance sectors. In detail, for implementing the project, “UniCredit” received 900,000 Euro from the FBA (which assessed positively the “Being Senior in UniCredit” project presented by the company). This is the official cost for realising the project and its related activities (i.e. the survey, training courses, etc.), even though real costs were higher, since a part of the additional work carried out by some company’s employees involved the development of “Being Senior in UniCredit” (e.g. project’s coordinating team, tutors, mentors, etc.) and its related initiatives has not been fully paid/covered by the mentioned funding source.

No public or political incentives have been used for realising this project. The company preferred to use only the mentioned private funding source (i.e. the FBA), specific for the banking and credit sector, that allowed to implement the project at the national level.

UniCredit did not made an economic evaluation of the return on investments of the project. Nevertheless the company has positive and encouraging information about indirect indicators about the return on investments of “Being Senior in UniCredit”. For example, the results of the “People Surveys” among all company’s employees carried out before and after the implementation of the project (i.e. in 2011, 2013 and 2015) show that the “engagement index”, used to measure workers’ pride/sense of belonging to the company, is constantly higher (and increasing over time) among older workers (both over 50 and over 55) when compared to the total workforce. In the opinion of the interviewed coordinator of the project, these results are a proxy that “Being Senior in UniCredit” was able to more value, engage and enhance both the working motivations and the working conditions of the company’s older workers. Furthermore, in general, the feedbacks/evaluations of training courses made by participants were generally positive, since training activities and project- related initiatives have also been useful for updating/acquiring new skills and competencies, for working better (e.g. using updated computing skills), and to experience new working roles (e.g. mentors, tutors, Temporary Manager). It is also important to underline that older workers involved in “Being Senior in UniCredit” have often provided advices and suggestions (some of them mentioned above) to the project’s coordinating team and to experts/trainers carrying out training courses, in order to improve the effectiveness of some activities implemented. This highlights a pro-active role of older workers involved in the project who were not only passive objects of top-down strategies.

### **Best practice example 2: Transferability**

Transferability of all UniCredit Group measures:

“Being Senior in UniCredit” (and related activities) is a strong and positive strategy through which the company tried to face both the ageing of its workforce and the extension of working lives of employees due to the enactment of the last Italian pension reform. One particular strength is certainly the idea to start the process for defining actions and measures to implement, with a survey among older employees, mainly working in (non top) managerial

roles. Indeed this survey was able to highlight wishes, needs and professional expectations of this company's age-segment of the workforce, according to which UniCredit designed and structured the specific initiatives and actions of the project. In sum, the "voice" of older workers have been taken into account. The wide set of measures realised within the project was an important and useful aspect for engaging and valuing older workers, for updating their know-how and their skills and for sustaining their motivations, pride and sense of belonging to the company. Furthermore, most of the initiatives implemented improved both the quality of work and working conditions of the older workforce, which still feel to be useful for the bank. Despite these general and positive aspects, not all the older workforce accepted to be involved in some activities promoted by the company (e.g. around 44% did not participate in the initial survey), and this is partly due to the presence of some age-related issues (e.g. stereotypes) within the bank. For example, despite the efforts of the company to avoid this, some senior workers did not accept to be considered sort of "old" by the company, or did not want to be involved in initiatives considered a sort of "ghetto", concerning the age composition of participants. The above could be associated with a more general issue: the necessity to work in a long-term period for promoting a different and innovative culture of age management within the company, stimulating at the same time solidarity between young and older workers. Some measures implemented (e.g. mentoring, tutoring, workshops) have actually fostered intergenerational cooperation. But, at the same time, within the company there are some emerging tensions (highlighted also by the interviewed coordinator of the project) among different generations of workers. Indeed, on the one hand the bank is committed in promoting young talents, but, on the other hand, it works for better managing the general ageing of its workforce (mean age: 45 years) and for valuing older workers, especially the ones with strategic know-how and competencies for the company's performance. The result is that young talents push for taking up management/leadership jobs/roles, but they have few chances, since most of older managers/leaders will stay longer within the company, due to the pension reform and their strategic experience for UniCredit (which would to counter the risk to lose these workers with strategic know-how and skills). Of course, the generational turnover will take time, and the company, that is committed to favouring this process, is now working towards a harmonisation of the relationship between young and older employees, for example with some mentioned specific initiatives (e.g. mentoring, tutoring) and by promoting knowledge transfer.

External phenomena affect/may affect both positively and negatively the further development of UniCredit's measures and strategies. For example, the extension of working lives due to the last pension reform determines the need to implement other initiatives (as well as sustaining the wide implementation of the good practices emerged from the "Being Senior in UniCredit" project) for improving the working conditions of older workers within the company even in the near future. Knowledge of good practices of age management and for the enhancement of the older workforce realised by other companies/in other countries, as well as the possibility to repeated access to funding sources from the banking sector (i.e. the FBA) for lifelong learning activities may be useful for UniCredit in order to design further ad

hoc activities for its older workers. But at the macro level there are some threats to the company's older workforce and their professional perspectives. The economic crisis could cause a downsizing of the workforce, for example of older workers without strategic skills and know-how. An announced possible introduction of new early retirement schemes in the Italian pension system might reduce the focus and the commitment of the company towards both age management and ad hoc initiatives for older workers. Last, there is a general lack of organic policies for supporting the management of an ageing workforce in the Italian labour market.

**The transferability of the whole project is not easy due to the following needed characteristics:**

- a) the high amount of external funds needed to design and implement it;
- b) the specific economic sector of UniCredit;
- c) the large company size.

Furthermore, the project has been conceived and realised as a specific initiative for UniCredit. However, the general philosophy and the company's strategy to approach the issue of the ageing of the workforce, and some specific measures promoted by the "Being Senior in UniCredit" project seem to be quite easily transferable to other companies of the banking sector, or even to some companies operating in different economic sectors. The reason is that some general needs of older workers may be similar in many companies (e.g. flexible working time arrangements, training and lifelong learning, the necessity to be valued and motivated at work, etc.). Moreover, companies in practically all sectors have to deal with the extension of working lives and the ageing of the workforce, by implementing innovative solutions or taking inspirations from good practices for managing this issue realised by other firms. Related to this, "transversal" aspects and transferable initiatives developed by UniCredit are, for example, the realisation of surveys investigating older workers' needs and expectations, mentoring, tutoring, flexible working time arrangements, training courses (beyond the ones mandatory by law). These initiatives have to be adapted to specific needs of other companies and of their workforce.

Concerning sustainability, many of the initiatives realised through the project have become stable good practices within the bank, widespread in all its branches. For example, intergenerational mentoring and tutoring, the Temporary Manager initiative, some of the most effective/appreciated workshops and training courses (e.g. about risk management; leadership in time of economic crisis, ICT updating) are structured practices/initiatives available for employees of the company even after the end of the project. The company has also planned to strengthen the development of the mentioned initiatives and to implement other activities targeting older workers in 2015-2016. For example, UniCredit will carry out another survey on older workers' needs and expectations, in order to get other supplemental and new information about this age segment of the workforce that is changing in comparison

to 2012 (when the first survey was realised). Indeed, the number of older workers will probably increase (around 12,000 units are estimated to be over 55 within the Italian network of UniCredit Group), and their needs and working expectations could be different if compared with the results of the first survey. Through this new survey the company will design and implement further ad hoc initiatives for older workers. Therefore UniCredit, despite the end of the “Being Senior in UniCredit” project, still has a mid-long-term strategy targeting its older workers (and for supporting age management of the whole workforce).

### **Best practice example 2: Innovation**

The “Being Senior in UniCredit” project and related measures implemented, have been conceived as an innovative and specific initiative promoted by the bank in order to manage the ageing of its workforce and the extension of working lives of employees. On the one hand, the initiative is innovative since in Italy there are not many other similar existing initiatives at the company level, implying a systematic and integrated approach for managing and valuing the older workforce. On the other hand, the project is innovative for several other aspects, for instance the involvement of both the older workforce and company’s unions from the beginning of the process, the realisation of a survey among older workers aimed to know their needs and expectations, for having designed and implemented the specific measures targeting the older workforce according to the mentioned survey’s results. A further element of innovation lies in the fact that UniCredit, through this project, is developing a long-term strategy with the goal of valuing older workers, strengthening their role within the company, improving their working motivations and conditions, supporting, at the same time, a new culture of age diversity management within the bank. Another innovative aspect is the participated approach, which includes several company’s units, unions, older workers and employees in general. Concerning health and welfare services, the project offers innovative solutions (at least for the Italian context) targeting older workers’ needs, such as, for example, counselling, a company’s health care insurance, other wellness initiatives, measures able to prevent and to promote good health conditions of the ageing workforce.

### **Best practice example 3: Sozial-Holding der Stadt Mönchengladbach GmbH, Germany**

Sozial-Holding of the city of Mönchengladbach is a service provider for the care of elderly persons. It was founded in 1996 and is a 100% owned subsidiary of the city Mönchengladbach.

The core business of Sozial-Holding is running seven nursing homes in six places, as well as outpatient care and semi-residential care. Furthermore Sozial-Holding offers apprenticeships and vocational training as well as placement and training of unemployed people.

The care sector is a sector with high physical and mental strains. Taking care of residents, lifting and moving them can have considerable (negative) impact on employees' physical health. Mental coping with an increasing workload and residents' suffering can be difficult. The requirement that the residents need support 24 hours every day of the year means that employees have to work in shifts including night shifts, which limits the possibilities for flexible working hours.

### **Best practice example 3: Description**

The knowledge and standards in the care professions change and this requires constant further training. Besides vocational training obligatory by law, Sozial-Holding offers additional courses, e.g. which help employees to better cope with stress during work. The courses are carried out by the own Bildungs-GmbH (education company). A special characteristic is that courses do not only take place in classrooms but also on the job. That means that trainers accompany the employees for a couple of hours and train them during their daily work. This method has the advantages that it is better combinable with work duties, course content is instantly applied and it corresponds better to the learning habits of older or low qualified employees.

Health is considered very important because a healthy body and mind are very important to fulfil the tasks at work. Workplace health promotion in the Sozial-Holding covers orientation for new employees, workplace analyses and health training supported by a certified health advisor. For mental issues the Sozial-Holding offers psychological counselling.

The certified health advisor plays a key role for the health promotion because she coordinates the health measures and offers employees' personal contact. The health advisor studied rehabilitation and health management and was hired in 2013. She works fulltime and with her qualification she may counsel and also give classes. She is present in each nursery home one day per week. There she offers individual health counselling, Pilates and walking classes, rest periods and instructs employees at their workplace, e.g. how to lift a resident. The individual health counselling is about topics like physical health, stress and nutrition. Because of her frequent presence and her personal contact there is high mutual trust between her and other employees. During the orientation for new employees the importance of and the opportunities for health promotion are emphasised. Therefore they know right away what they can do to maintain their health and who they can address for health issues.

In each of the nursery home there is a health representative and a fitness centre. The health representative is qualified, acts as a contact person and gives introductions for the workout devices. The health representatives in the nursery homes work close together with the health

advisor. Furthermore, since 14 years massages and osteopathy are offered by a physiotherapist at the workplace. Costs are covered by the employer. Additionally a long-distance run and a health day is taking place once per year which has a team building effect. During the health day employees can conduct health checkups and check e.g. their blood pressure, blood sugar or blood vessels. This can be done during working time; every employee may take part for up to one hour.

Workplace analyses are made to examine the strains of the individual employee. The results of the analyses lead to suggestions for workplace improvements and new initiatives.

Since the prevalence of mental illnesses was strongly increasing, psychological counselling for employees was introduced in 2012. However, mental problems are still a taboo and it takes usually very long to get an appointment for a psychological therapy. To avoid long waiting times and to guarantee anonymity, an external contractor for psychological counselling was engaged. Employees are being actively informed about this offer by mail, intranet and internal meetings. As psychosocial problems can also affect relatives which may result in strains for employees the service is offered for both employees and their relatives. To identify psychological strains of employees working in care and to assess the demand of psychological counselling an anonymous survey is carried out by an independent research institute regularly. According to the interviews about 10% of the staff is making use of this service and the prevalence of psychological illnesses has been reduced remarkably.

All in all the health measures are highly appreciated and frequently used by the staff. Particularly the certified health advisor, the massages and the psychological counselling are strongly used. However, measures that involve physical exercise are not as popular. The fitness centre is not used by many and the trial of an instructed break with physical exercises failed even though it was not exhausting. According to the interviews the employees prefer to relax in their breaks and after work because their work is physically demanding. Renaming of the active break into relaxing break increased the interest a lot.

### **Best practice example 3: Implementation**

The psychological counselling costs 50,000 Euro per year and is used by about 10% of the employees. The prevalence of mental illnesses decreased to a remarkable degree since the counselling was introduced. As mental illnesses often lead to long term non-productive time the return on investment of the counselling is quite high.

Implementation of all Sozial-Holding der Stadt Mönchengladbach GmbH measures:

Except for the project TOP (chapter 'LifeLong Learning'), all measures are financed by the company's own budget or by governmental funding that all care services are entitled to (e.g.

the hospital per diem charge (Pfleagesatz)). The CEO emphasises that the employer has the responsibility to act preventively and pay measures in advance. Hence, the measures developed always result from an actual internal demand and are conceptualised individually.

Driving forces are the CEO and the works council. The CEO is very open to new approaches and keen on working conditions improvements. Continuous attitude surveys and analyses of reasons of sickness absence reveal the demands of the employees. The CEO is living up to the motto that the human being occupies the centre stage.

The works council enforced several company agreements, most notably the works council agreement on flexible working time. The works council is organised very politically and has a strong position in the company. With a so called wall paper, a poster that is put up in the foyers with questions about job satisfaction, they retrieve the employees' opinion about managers and get honest responses. These proposals are taken seriously and affect the work council's work.

### **Best practice example 3: Transferability**

Transferability of all Sozial-Holding der Stadt Mönchengladbach GmbH measures:

As Sozial-Holding almost completely renounces to work with external funding, transferability is relatively high. However, a prerequisite is a certain company size that goes along with organisational structures and a corporate budget that allows for the introduction of such measures. Once measures are implemented the preventive effect pays off the investment. For example if the average period of disability is shortened or avoided the return on investment is measurable. Even if the measures are adapted to the needs of the Sozial-Holding, they are transferable to other companies from the care sector because the general needs are probably equivalent.

To ensure sustainability two aspects need to be considered. Following the philosophy of Sozial-Holding measures need to be adapted to needs of the employee – not vice versa. This is especially true for vocational training and health promotion that is often organised at the workplace. Furthermore a systematic approach is necessary so that the measures complement each other and cover the whole demand. This leads to higher participation and acceptance because of a better fit of measures.

### **Best practice example 3: Innovation**

Sozial-Holding Mönchengladbach tackles common problems for employees in the care sector with clearly problem-focused measures. The strength of Sozial-Holding's measure for (older)

workers' workability is the clear focus on sector-specific problems, employees' demands and preferences, a consequent realisation and some attention paid to costs and benefits. Measures taken by Sozial-Holding are not extraordinary, but this example shows a whole package of measures imitable by other companies, especially in the care and health sector.

#### **Best practice example 4: InfraLeuna GmbH, Germany**

InfraLeuna Ltd. and associated companies own and operate infrastructure facilities at Leuna (InfraLeuna GmbH 2015a). Leuna is a city in Eastern Germany (former GDR) and Leuna is an industrial location in the Middle German chemical triangle with a tradition of chemical production dating back to 1916. The chemical site Leuna is one of Germany's biggest industrial sites (about 7 x 5 kilometres), with an annual turnover of ca. € 10 billion and about 9 000 employees in more than 100 companies (Nowak 2013: 3). Leuna used to be the GDR's biggest chemical facility.

Currently InfraLeuna has 681 employees and an annual turnover of ca. € 0.32 billion. InfraLeuna Ltd. offers a wide range of services and provisions to the companies located at the Leuna site. InfraLeuna is not only providing services but also develops the site (InfraLeuna GmbH 2015a; Nowak 2013: 4, both cited in the case study).

Due to the wide range of activities also the range of occupations is very broad. Besides chemists and engineers there are employees in water supply and disposal, laboratory workers, workers in the areas of metalworking and electricians as well as in the area of industrial services, and medical staff in the company doctor service. Further, InfraLeuna employs engine drivers, security staff, and firefighters (Nowak 2013: 6, 7; Interview HR department 2015; Interview works council 2015).

Most tasks are physically demanding. For example, work of plant security workers as well as engine drivers is strongly weather-dependent. Further, they are – as numerous other employees – employed in shift work (Interview HR department 2015).

#### **Best practice example 4: Description**

The preventive health programme already exists since 2005. The within-company agreement "Preventive health" is considered the start for a health-conductive design of working places within InfraLeuna (Interview works council 2015). The health programme (concluded as voluntary company agreement) is the basis of the implementation of the company health management, which is to be extended according to the collective agreement

„Zukunftssicherung“ („safeguarding the future“) (collective agreement „Zukunftssicherung“ 2012: 3). Health-related measures are comprehensive and encompass measures of occupational safety, of integration management, as well as measures to create age-appropriate workplaces. This is accompanied by offers from the company doctor service, the utilisation of physiotherapy, additional medical checks free of charge as well as a health week und regular activities to health issues and numerous sports activities (Nowak 2013:14, 15).

The sports programmes offered by InfraLeuna in cooperation with the local sports club TSV Leuna is comprehensive. The membership fee for the sports club is covered by InfraLeuna; this also applies to employees' families. The company sports programme encompasses an on-site football league, volleyball, swimming for shift workers (with adjusted opening times), back training as well as preventive sports. Further, employees are supported and motivated to take part in the Mitteldeutscher Marathon (a local marathon run), the company team triathlon and the charity run (Nowak 2013: 14,15).

The company doctor service offers annual medical check-ups as well as seasonal influenza virus vaccinations. Further, in case of acute sickness, first care free of charge is offered by the company doctor service. Additionally, all employees are informed monthly about current health issues (InfraLeuna GmbH 2015b).

Further, there is an in-company physiotherapist offering massages. Part of the physiotherapist's tasks is to check working places under aspects of ergonomics, the instruction of employees for exercises at the workplace as well as training for the firefighters and the execution of prevention courses (Interview HR department 2015; Interview Works council 2015).

In the context of annual health weeks employees have access to free tests of eyesight, hearing and glasses. Further, offers encompass nutrition advice, measurements of body fat, measurements of vein and blood pressure, a back-friendly fitness check as well as lectures, workout advises and taster courses in the sports room (Nowak 2013: 15).

On action days there are additional medical check-ups, e.g. skin screenings. The high attendance partly results from the fact that measures take place at employees' workplaces. Further, during action days there are lectures on issues such as alcohol, intestinal cancer and flu pandemics (Nowak 2013: 15; Interview works council 2015).

Due to the general rise of diagnosed mental illnesses in Germany, the offers from health management were complemented with external physiological employee consultation offered by Human Protect Consulting Ltd. Besides the possibility of advice by telephone, in case of need there is the possibility to get a quick appointment with a psychologist (patients normally wait for months for such an appointment). Based on employee surveys, mental burdens at the workplace are analysed in order to keep them low (Interview HR department 2015; Interview works council 2015; InfraLeuna GmbH 2015b: 8).

In order to coordinate and to further develop health activities, in 2010 a health team has been founded. The team consists of twelve employees from ten work areas (amongst others, security, as well as staff council and works council. It is headed by the company doctor service. The task of the health team is the optimisation of the health services, e.g. the organisation of the health activities and the continuous provision of offerings supplementing the health week. Another important part of the team's work is the communication of information to employees. The members of the health team meet once every five or six weeks. For the time of the meetings the team members are released from the normal duties (i.e. they get paid for the time of the meetings) (Interview HR department 2015; Interview works council 2015; InfraLeuna GmbH 2015b: 3).

From 2012 until 2014 InfraLeuna Ltd. in cooperation with the Fresenius University of applied sciences and the Institute for Applied Work Science (Institut für angewandte Arbeitswissenschaft) took part in the EU-funded project "g.o.a.l.". In this project six employees got further trained and became multipliers for workplace health management. Since 2013 those six employees reinforce the health team. The superordinate task is the communication between employees and health team. Employees' preferences and needs are conveyed to the health team this way, in order to extrapolate demand-actuated measures. Multipliers' work takes place under an annually changing slogan, e.g. in 2015 with the title "InfraLeuna: Wir sorgen vor!" ("InfraLeuna: We take precautions!") (Interview HR department 2015; InfraLeuna GmbH 2015b: 3).

#### **Best practice example 4: Implementation**

Implementation of all InfraLeuna GmbH measures:

For the implementation of the fields of action laid down in the collective agreement „Zukunftssicherung“ („safeguarding the future“) the ring-fenced financing via an in-company funds is ensured.

According to the HR department, the costs for health measures are low. For sports activities, expenses are limited to the sponsorship of the marathon, financing of equipment and membership fees for the TSV Leuna (the local sports club). Offerings on action days take place in cooperation with statutory health insurances (Interview HR department 2015).

Similarly, health-related staff expenses are low. The physiotherapist is a permanent member of staff. The massages which can be utilised during working time are being paid by employees themselves. In some cases employees can get reimbursed by their health insurance (ibid.).

Further training is financed by the company. In the past, subsidies by the European Social Fund (ESF) were used. Due to the bureaucratic burden InfraLeuna will refrain from applying for ESF funding in the future (ibid.).

In comparison, flexible working time arrangements are a bigger expense factor (Interview works council 2015).

#### **Best practice example 4: Transferability**

Transferability of all InfraLeuna GmbH measures:

Basically the measures are transferable to all other companies (e.g. no extraordinary financial preconditions). A need-based range of measures presupposes knowledge concerning employees' needs and preferences. Further, some measures necessitate a minimum number of employees (e.g. so that an in-company physiotherapist is sufficiently busy).

Primarily the low costs of the health measures could be an incentive for other companies/organisations to offer similar programmes. Sports offers depend on local circumstances; cooperations with local sports clubs are also possible in other areas. A football league as in the chemical site Leuna (due to its city-like characteristics) is also possible in other companies located in a commercial area (manufacturing, services). Further, adjustment of swimming facilities' opening times to shift workers' preferences can be organised at other sites. Given a certain number of additional guests, (public) swimming facilities could open sooner. Possibly companies can get to some agreements with municipalities on this.

As the offer of the "service office for job and family" shows, the interconnectedness with external providers can spawn comprehensive and sustainable structures supporting employees in different life phases.

#### **Best practice example 4: Innovation**

One (socially) innovative part is located in the sports cooperation with other local actors (the sports club, the marathon run, other companies at the site). Another outstanding characteristic is the wide range of measures, especially in the area of occupational health. The adjustment of sports offers (here: swimming) so shift workers' needs is highly effective due to this group's health problems and due to low deadweight effects (probably the offer does not strongly substitute for what concerned employees would have done anyway, somewhere else).

#### **Best practice example 5: Rimi, Latvia**

Rimi Latvia is one of the leading retail store chains in Latvia. It operates in Latvia since 1996. In 2005, Rimi Baltic, represented by Rimi Latvia in Latvia, was established as a joint venture

between ICA and Kesko Livs. Since 2007, Rimi Baltic is a subsidiary of the Swedish retail chain ICA Gruppen.

Rimi Latvia operates three types of stores: supermarkets, hypermarkets and low cost stores. The number of stores is 113 out of which 40 are supermarkets, 27 are hypermarkets and 46 are low cost stores named Supernetto.

In 2013, there were 88,8 thousand people employed in the retail sector, an increase of almost 25% since 2008. In 2013 40% of workers in the retail sector were employed by one percent of the biggest companies in the sector. Rimi Latvia is the second biggest employer in the retail sector and third biggest in the country. In 2014, Rimi Latvia employed 5,700 people. The biggest retail company in Latvia employed 9,100 people, being also the biggest employer in the country.

In terms of turnover, Rimi Latvia is the second biggest retail store chain. In 2014, Rimi Latvia's turnover was EUR 658 million which is 8.1% higher than in 2013. In the same year, the sector's leader earned EUR 660 million in revenues.

#### **Best practice example 5: Description**

- Initiatives targeted at employees' health conditions
- Provision of health insurance with better terms for longer tenure
- Provision of glasses for employees with visual impairment
- Colleague support fund

According to the Labour Code, companies in Latvia are not obliged to provide health insurance for their employees; yet, many companies choose to provide one. Rimi Latvia ensures health insurance for all employees with tenure longer than one year. The specific aspect of Rimi Latvia's health insurance provision (what it covers, how much it covers, etc.) is that the terms of health insurance improve with tenure.

The critical years are ten and fifteen. Thus, after 15 years of working in Rimi Latvia, an employee gets the best package of health insurance provided by the company, which is equivalent to the ones senior executives have. The best insurance package contains unique terms such as increased monetary coverage and partial coverage of dental services.

Secondly, once a year, Rimi Latvia covers the expenses on glasses for employees with visual impairment. If a doctor prescribes glasses to an employee of the company, he or she can reimburse a part of expenses associated with the glasses' purchase.

Thirdly, in 2014, Rimi Latvia established Colleague support fund consisting of donations from employees and the company itself. Colleague support fund operates as an emergency funding for serious accidents with Rimi Latvia's employees. The fund was created in order to communicate that an employee can rely on help from the company and colleagues in case of a force majeure situation. Employees have to apply to receive funding and a specially

established commission comprised of top managers decides whether and what amount of funding to allocate to a particular employee. In 2014, the funding was distributed to four employees, out of which three needed an expensive surgery that was not covered by their health insurance.

#### **Best practice example 5: Implementation**

The main reasons for health-related initiatives are to retain employees through giving additional motivation to stay within the company, to receive better benefits as well as provide the feeling of safety and stability in case of force majeure situation with an employee's health.

#### **Best practice example 5: Transferability**

With respect to transferability, the initiatives are fairly easy to understand and to transfer to other companies/organisations. In order to transfer the initiatives to other companies, a company should understand the current situation with respect to employee diversity, define whether diversity is a goal of the company and most importantly allocate big effort for individual communication with employees to ensure that everyone is "on the same page".

In countries where employees are always medically insured (e.g. Germany) the measure is transferable to the degree that companies covers costs which are not covered by public health insurance, e.g. medical check-ups, some dental services and products, financing of glasses (as at Rimi Latvia) etc. (see, for example, the company Bayer in the Best Practice Report, page 127: <http://mopact.group.shef.ac.uk/wp-content/uploads/2015/08/D3.2-Extending-working-lives-Best-Practice.pdf>)

#### **Best practice example 5: Innovation**

From mentioned measures, colleague support fund can be brought out as something that is not widespread practice.

#### **Best practice example 6: Eesti Energia, Estonia**

Eesti Energia Group is the biggest employer in Estonia with approximately 6,700 employees. Eesti Energias' main economic activity is electric power generation, transmission and distribution, being strategically important in relation to Estonian security. Overall, there are 8,000 employees working in this sector, thus, majority of the employees working in the sector are working in Eesti Energia. According to company data for 2014, most of Eesti Energias employees (76%) work in Ida-Virumaa region, 80% of all Eesti Energias workers are men and the average length of service in the company is over 14 years. All employees working in Eesti

Energia are divided into three segments (managers 9%, specialists 35% and workers 56%). The company is focused on ensuring succession in all those segments, but especially among engineers and other business critical occupations.

Eesti Energia values all of their employees and pays attention to their commitment and motivation, but also makes significant efforts to be a desired employer for young and talented students. The company is usually in the top of the list of the most desired employer among job seekers and students.

### **Best practice example 6: Description Eesti Energia**

Subsidising sports clubs. Company encourages employees to take up sports and live healthy lifestyle by paying part of the sport club fees etc. Company also organises regular health check-ups for miners annually. In addition, the company organises sport events in Ida-Virumaa called Narva Energy Run. According to 2014 data, 2,408 employees of Eesti Energia took part in sports clubs activities. In addition to this, employees are encouraged to actively attend different recreational sports events and internal and cross-firm competitions.

Emphasis on work safety and work environment. One of Eesti Energia core values is safety of its employees. The company has experienced work environment specialists working in all of its affiliates. The company also pays attention to teaching and guiding its employees to ensure the safety. In 2014, more than 800 of its employees passed occupational safety training. In 2014, the company developed a new occupational health and safety strategy for 2015-2018. The company has developed education videos on occupational safety to raise awareness of different hazards employees are exposed to in work situations and to educate employees about the correct procedures in case of danger. Also, persons responsible for company's occupational safety are meeting regularly to discuss and exchange ideas on how to even further improve the occupational safety. According to company data, in 2014, the average frequency coefficient of occupational accidents in the company per 1,000 employees was 3,72, which is two times lower than the average Estonian coefficient 7,41. Also, while the Estonian average has gone up from 4,19 from 2001-2014, Eesti Energia's coefficient has gone down from 7,21 to 3,72 during the period from 2001-2014.

### **Best practice example 6: Implementation Eesti Energia**

Eesti Energia Group has 5 affiliates (Eesti Energia Õlitööstus AS, Elektrilevi OÜ, Eesti Energia Kaevandused AS, Eesti Energia Narva Elektrijaamad AS, Eesti Energia Tehnoloogiatööstus AS) and has holdings in several other companies. Therefore, the company's range of initiatives targeted at its employees is very wide. General personnel management practices are created centrally. However, in addition, there are several trade unions in the company that have concluded different collective agreements. While the company aims to harmonise the collective agreements, there are still some differences between the affiliates. Therefore, the

measures presented in this case study do not include all the measures the company has implemented, but mainly the ones that are more involved with keeping older workers in the labour market. Overall, employee commitment and job satisfaction survey conducted in 2014 indicates that 80% of employees appreciate the benefits offered by the company.

The average age of Eesti Energias employees' is currently around 45 and 69% are older than 40 years old (data for 2014). To make matters more complicated, Eesti Energia's mining and production takes place in Ida-Virumaa region, where most employees are older than 50 years and where it is difficult to find new employees, since the region is not attractive for young persons with university degrees. The company strives for a diverse workforce and values all of its employees.

Hence, the company has to think about its ageing workforce and how to maintain the company's sustainability in the long run. Therefore, the company makes twofold efforts: on the one hand they are engaged in attracting more young people to study technical professions and specialities critical for the company to ensure the necessary workforce in the future and on the other hand they are also focused on keeping their current qualified labour motivated and satisfied to minimise the risk of labour shortage.

#### **Best practice example 6: Transferability Eesti Energia**

The measures are independently easily understandable and can be sustainable and transferable; however it mostly depends of the size of the company and financial resources. Small companies do not have enough financial and human resources to invest in and implement most of the measures. However, these measures can be used to generate and design measures that can be used by smaller companies.

#### **Best practice example 6: Innovation Eesti Energia**

The measures could not be brought out as innovative.

#### **Best practice example 7: Interactive digital portal, the Netherlands**

The digital portal is an initiative of the National Platform for Sustainable Employability (*Nationaal Platform Duurzame Inzetbaarheid- NPDl*) which was established by three partner organisations in the Netherlands:

- Kroon op het Werk - a foundation of employers' network that connects businesses and their consultants on sustainable employability;

- TNO - an independent research organisation with a focus on knowledge development and innovation; and
- WerkVanNu - a consulting and development company that focuses on the theme of sustainable employability.

NPDI forms a learning network in which partners (consultants, companies, organisations of employers) can exchange ideas and expertise, learn about good practices, and work on new interventions and integrated approaches to sustainable employability through open innovation and co-creation. By 2015, 75 companies and organisations joined the network which includes consultancy firms and advisory organisations, private enterprises as well as public sector organisations.

In 2010, NPDI developed a digital portal with the aim to provide practical support to companies and their employees to enhance sustainable employability at the workplace. The digital portal offers high-quality advanced instruments - such as the Sustainable Employability Index (SE Index) targeting employees and the Orientation and Company Scans (*Oriëntatie- en Bedrijfsscan*) for employers - that help organisations to prepare, implement and monitor their interventions in a customised way.

### **Best practice example 7: Description**

The model on which the digital portal and its instruments were developed is very much underlined by the concept of sustainable employability. It incorporates the idea that sustainable employability should concern both employers and employees and requires engagement from both sides. In particular, the model highlights the value of dialogue within the organisation. The design of the portal's instruments also integrates the key aspects that have been shown to influence sustainable employability (health, knowledge & skills, motivation & commitment, and work-life balance) and which comprise the core dimensions of the SE Index. Finally, the model also acknowledges the importance of the organisational context (i.e. different characteristics of companies) and the complexity of issues and challenges at the company and at the individual employee level, and provides tools that support the development and implementation of tailor-made interventions.

Employees can work on their employability through their personal digital portal using the SE Index. It allows them to assess their employability and see at a glance what areas they need to work on (Vos & de Jong, 2014). Based on this, individual employees are able to produce a personal action plan and monitor change. In parallel, employers can identify potential improvements within their organisation and can monitor the effect of the measures taken through their own portal using the Orientation and Company Scans and the Management dashboard.

The Orientation Scan helps employers to make an assessment of the company's ambitions in relation to current and future challenges posed by external and internal developments (e.g. ageing workforce, flexibility of organisational structure, technological change, increased competition etc.) and to set goals and develop actions accordingly (Hooftman et al, 2014). It

is possible for the employer to link the results of the Orientation Scan to those of the SE Index via an online Management dashboard which can be accessed by the whole management of the organisation. For reasons of privacy, the employees' SE Index scores in the four dimensions can only be accessed there in an aggregated format and is presented at a group level (for a minimum of 15 respondents). It informs the employer of the current state of employability of its workforce indicating where the problems are and where improvements are needed. The information also allows employers to align the goals and ambitions of the company with those of the employees and plan and develop actions and measures in line with the available human resources.

The Company scan is intended for companies who want to get started with actual implementation, but want to have a better understanding of the extent to which their organizations are sufficiently equipped to do so considering all levels of the organisation (i.e. Management, HR, Works council) (Hooftman et al, 2014). It basically helps to identify potential gap areas (e.g. planning, resources, communication) which need to be targeted to improve the organizational conditions for the measures to be implemented.

In addition to the above instruments, the digital portal provides access to a range of other tools and services to both employers and employees (e.g. action plans, personal reports, evaluation measures, career instruments, e-coaching) which can be combined with the SE Index and the Orientation and Company Scans (NPDI Website). Companies are able to present their range of interventions on the portal, allowing actions to be initiated in a simple way. Users of the digital portal can work with external advisors connected through NPDI's learning network. This is a physical network that meets four times a year and includes representatives from the main partner organisations as well as companies and their advisors.

### **Best practice example 7: Implementation**

The initial idea of NPDI was to create a network of employers where they could learn from each other's best practices and benefit from the knowledge and research generated by companies like TNO. While useful, the network turned out not to be sustainable on its own. There was not enough incentive for employers to stay attached and to stay active and provided little practical support to actually implement sustainable employability within their organisation. The digital portal and its instruments were developed to try to address this issue.

A major challenge was to come up with a digital infrastructure and instruments which meet the different needs and demands of companies and at the same time incorporate the core features of sustainable employability. It also had to be relatively simple and practical enough to attract users. The digital portal took years to develop starting first with the conceptual model and then transferring it into a digital format. The unique expertise provided by the three collaborating partners was vital in this process. The involvement of professional advisors who provide support and guidance to companies was essential to make the initiative sustainable and to help users making the best out of the tools and services offered via the portal. NPDI offers two separate contracts to their advisory partners: one is for becoming a member of the learning network and the other is to use the digital system. Advisory partners

who would like to use the digital portal are generally required to be a member of the network. Partners also need to share the mission and core values of NPDI.

Subsidies from the government were paramount in the early stages for setting up the digital portal and developing the instruments. Funding was also provided for research on sustainable employability. Making the digital portal sustainable, however, also required careful preparation of a business model. Today, the digital portal is financed from user payments which appear to generate enough income to not only maintain, but also to invest in refining the portal, its services and instruments in order to keep users engaged.

Great importance is placed on the monitoring and evaluation of the initiative. Information gained from the monitoring reports of TNO strengthens the basis for managing results, and fosters learning and knowledge-generation. Evaluations also measure the effectiveness of the instruments and help to identify potential areas for improvement.

### **Best practice example 7: Transferability**

The digital portal and the instruments (SE Index, employer tools) can be transferred to other national contexts given that they are adjusted to the needs and demands of companies and employees. The portal was developed through the collaboration of partners, building on their unique knowledge and expertise (this is especially important as the design and content of the instruments should be based on research and evidence). Thus first establishing a partnership or network would be the best way to start. In the case of this initiative, the partnership was set up with a specific focus on sustainable employability, a relatively new concept in the Netherlands.

### **Best practice example 7: Innovation**

There is growing awareness among Dutch employers about the issue of sustainable employability and its importance, but they often lack the information and know-how to implement it within their own organisation. The digital portal is an innovative example for transferring knowledge about sustainable employability into actual practice. The portal and its instruments have been developed and are maintained through collaborative research and learning and during the process it has also created a strong partnership.

While the digital portal is a useful tool in itself, there is also a need for a network where companies and advisors can meet face to face. The learning network serves as an important complement to the digital portal by offering members/users to learn from already implemented company actions and to develop new ideas through open innovation and co-creation.

### **Best practice example 8: ServiceTeam Nyborg, Denmark**

The main actor in this example is ServiceTeam Nyborg, a public cleaning company under the Municipality of Nyborg – a mid-sized Danish municipality with a population of 30,000 inhabitants – situated on the island of Fynen. ServiceTeam Nyborg is a self-managed entity under the budget supervision of the Municipality of Nyborg. Its main business is cleaning in a wide range of municipality institutions, e.g. schools, kindergartens, elderly homes and offices. Beyond its core cleaning business, it also offers ad-hoc services such as washing for municipality institutions. ServiceTeam Nyborg has 80 employees.

### *Background*

In 2008, all the municipality's cleaning activities were placed in one entity and ServiceTeam Nyborg was founded. The idea was to centralise the municipality's cleaning services in one place. Prior to 2008 cleaning assistants had been situated in (and hired by) each of the municipality's institution. At the same time, the current leader of operations was hired to manage ServiceTeam Nyborg. From the start, she made it a priority to improve well-being in the work place. One of the key indicators in focus was reducing sick leave, and encourage an 'open' and diverse culture at work. In 2012, ServiceTeam Nyborg was awarded the prize for the best work environment in the Municipality (in Danish "Årets Arbejds miljøpris i Nyborg Kommune") (see also FS, 2012).

This case follows a red line from the work leading to the award and describes a number of initiatives. Most importantly, the project 'A full working life' aimed at retention of senior workers and which was the initial reason to pursue this case study. However, two other initiatives emerged during the interviews. One, 'Early action', aimed at reducing sick leave and improve well-being. This project was concluded in September 2015 and is now being evaluated (cf. below). Another project, "ServiceTeam Digitalisation" has been in a small pilot-testing phase since May 2015 and is currently being rolled out to all employees. Each employee will receive a smart phone, which is to be their primary planning tool (the project is described in detail under life-long learning).

The case of ServiceTeam Nyborg is particularly interesting for a number of reasons. First, most employees have a below (Danish) average level of educational attainment and it is a low wage occupation. Secondly, the nature of the work has traditionally made employees (in the occupation as a whole) susceptible to deteriorating health and ultimately likely to enter early retirement or disability pension schemes. There is an over representation of women employees in this occupational sector which also is more like to lead to early retirement (AE, 2011). Third, although ServiceTeam Nyborg is a public company (and therefore could be claimed to have a softer budget constrain than a private cleaning company does), the services it provides are eligible for outsourcing to private companies competing on the same service (e.g. the company ISS). There have been 'competition tests' ('konkurrenceprøvning' in Danish) in the past where private companies have been asked to give competing offers which are then tested against/held against the budget of ServiceTeam Nyborg. This in combination with a constant pressure to make public services more efficient provide a hard budget constraint for the operations (however, public money was involved in some of the initiatives as explained

below). This leads to the fourth reason to consider this case: there is a constant pressure for innovation in order to do the cleaning faster. This manifests itself not only in a constant stream of testing of robot vacuum cleaners and new tools to clean faster, but also in forcing management to think about how mobile technologies can be used to improve the planning of the work flow (see section on life-long learning). This is particularly important because the actual cleaning work is being done in disparate locations (where the various public institutions are located) making efficient communication regarding stock of cleaning material, sickness replacement, etc. crucial for the operations. Finally, although ServiceTeam Nyborg is the main actor in this, what has been done (cf. below) relies importantly on other public infrastructures. Most notably adult education provision (in Danish 'Arbejdsmarkedssuddannelseskurser (AMU)' and the local 'job centre' (in Danish 'jobcenter') for unemployment persons, but also the facilitation of different initiatives from a publicly funded advisory/consultancy (Cabi at <http://www.cabiweb.dk/>). This fact means that the description of the approach is somewhat complicated and not particularly easy to transfer to other country settings. However, more importantly, it shows that change is possible in a low-skill, high-risk occupation, but also that there are barriers to overcome.

#### *Overall description*

This section outlines the list of initiatives, which were initiated by ServiceTeam Nyborg in cooperation with Cabi in the project "A full working life" (in Danish 'Et helt arbejdsliv') and additional stand-alone projects. Cabi (a Danish consultancy) approached ServiceTeam Nyborg (among other companies) to seek their involvement in a project called a "A full working life". The main goal was to find ideas and tools, which are helpful in retaining older workers and prolong working lives in 'low-skilled' occupations. Some of these tools and ideas were implemented in ServiceTeam Nyborg.

During the interview phase, two other major initiatives were discovered which merited to be covered as well. The first one, 'Early action', focused on health and is described in detail below. In practice, this project is also related to retention of older workers because one of the general pathways to early retirement runs via extensive sick-leave and a 'negative' working environment (Barslund, 2015a).<sup>2</sup>

Another project, 'Digitalisation Nyborg', which was pilot tested in March 2015, is revolving around the introduction of a smart phone to all employees to manage communication, scheduling, ordering of cleaning products and other aspects of the job. While the rollout of the project is ongoing, it has an interesting life-long learning aspect to it. This part is described below in the life-long learning section. Unfortunately, it is too early to evaluate the results of what the senior manager explained as a commitment to have everybody on board after the introduction.

---

<sup>2</sup> This is a general observation not related to ServiceTeam Nyborg.

### **Best practice example 8: Description**

This section describes health initiatives which were initiated in cooperation with Cabi in the project 'A full working life' (in Danish 'Et helt arbejdsliv') (see overall description above for a more detailed account of the general setting) and a newer project named 'Early action' (in Danish 'Tidlig indsats' which ran from December 2014 to September 2015 (it is in the process of being evaluated). In total, there were three elements in place. Two – health check and healthy dieting, and general training in how to perform the job with the least possible impact on physical health – came from project 'A full working life' and were one-off measures. One element came from 'Early action'. 'Early action's main goal was to spot physical or psychological problems at the workplace at the earliest possible time before it could develop. It involved a commitment of senior management (including team leaders, which have the day-to-day contact with employees) to increase awareness of well-being of employees, and if potential problems – physical and/or psychological – are detected, they approach the employee with an offer of a first counselling (psychological, physical). Employees can also initiate the process, which starts with a general "well-being consultation" with the team leader. Participation is voluntary. Information has been very open. The quarterly staff newsletter (ServiceTeam, 2015) has featured interviews with employees having benefitted from the process.

### **Best practice example 8: Implementation**

For both the health check and advice on healthy dieting implementation was straightforward in the sense that employees were offered a health check and advice on adjusting their diet. Participation was voluntary. A significant barrier to implementation was that around 1/3 of employees chose not to participate. It was reported in interviews that in many cases the attitude of the employee was that health is not the employer's business. Generally, this perceived conflict and lack of mutual interest between management and employees is something that came up among many dimensions of the various initiatives. A number of employees have as background a working life in low-skilled occupations and with layoffs (including one employee interviewed), and may perceive hidden agendas behind any measure which potentially exposes weaknesses in their general workability and ability to do their current job. How to overcome the problem of "in order to help you, I need to know you need help" may be a wider issue.

The 'Early action' project was implemented with the help of the Job Center and a state grant (via the Job Center) to finance professional help when requested. The project has been evaluated internally in ServiceTeam Nyborg and is awaiting the external evaluation by the Job Center. Results suggest a significant fall in *overall* sick leave from 6 to 4 percent, translating into approximately 5 days less sick leave per employee per year. It is important to note, that this is an average over all employees not only those involved in the project. Sick leave had been on a downward trajectory for a number of years (Barslund, 2015b), so how much of the

decrease is due to the 'Early action' project is difficult to assess. With this caveat in mind, it is still impressive that the sick leave percentage in an occupation vulnerable to health problems can be much lower than for the average of employees in all Danish Municipalities and likely much lower than in the cleaning sector (FOA, 2004). This improvement has come alongside other initiatives on retention and longer working lives.

### **Best practice example 8: Transferability**

Transferability is clearly not without its problems in this case. For the 'Early action' initiative, there is first a short-term cost-benefit issue. If the starting point is a 2 percentage point reduction in days lost due to sick leave (cf. above), this translate into no more than 5 days of reduce sick leave per year per employee. In a low wage sector this saving (which in any case would not be borne entirely by the company), may quickly disappear if it results in a number of visits with psychologist, physiotherapists and others involved (e.g. a case worker from the Job Center). Second, and this is likely the most difficult thing to transfer, for this approach to be successful and able to avoid future days of sick leave, a high degree of mutual trust between management and employees is absolutely essential; and courage on either side. This implies that management has to be committed for the 'long-run' in order to establish the necessary trust. This has been the case for ServiceTeam Nyborg, but may take time to build from scratch.

The internal evaluation mentioned that there was "substantial resistance" among some employees approached by management regarding talking to a psychologist. While it is not clear if this is gender related, one can image that this would be an even bigger obstacle in male dominated sectors and occupations. Related to this there are also implicit privacy issues: one of the strengths of the project is the holistic approach, also potential involving people from the local Job Center, but for these to mentor and work efficiently with the employee there has to be some degree of information sharing (i.e. that the employee is seeing a psychologist). This could be a problem in a relatively small community, but also in relation to potential future job placements via the Job Center. One can imagine a scenario where a few years later the Job Center may think twice about sending a particular former employee of ServiceTeam Nyborg to a company asking for a 'stress resistant' person to help out if the Job Center knows that this person previously was in consultations against e.g. stress in the past.

In the Danish context a project similar to 'Early action' (though, less holistic) has been reported to achieve good results (Fagbladet3f , 2011).

### **Best practice example 8: Innovation**

The main innovation of this initiative lies in its holistic approach involving the local Job Center and outside health experts. This is combined with consistent communication from Senior management (which is a continuation of a consistent line of communcation) around diversity in the work place. Constant experimentation has also been important. The health and healthy

dieting part of the project was supported by a smartphone app in the beginning (common for the Municipality of Nyborg). However, this approach was later abandoned due to limited uptake and usage of the app. The key question here is to what extent the setup is dependent on senior management skills, which may be very difficult to transfer. Part of the innovation also lies in the 'proof of concept' of the possibility for reducing sick leave in a comparatively low-emuneration environment and extent working lives.

## **2.2 Work despite health problems**

### **Best practice example 1: Queen Alexandra College, UK**

Queen Alexandra College (QAC) is a national college for people with disabilities based in Birmingham, England. Employees are aged between 21 and 73, of which approximately 10 per cent are aged 65 or over. QAC's approach that contributes to extending the working lives of older workers is, largely, one of non-discrimination mainstreaming. As such while QAC does not operate any initiatives that specifically target older workers, they do have general policies and procedures in place to ensure the better integration of the needs of all age groups. This notably includes opportunities for flexible working, the equitable management of absence through ill-health and age-neutral recruitment.

#### **Best practice example 1: Description**

Queen Alexandra College's measures in the field of health are not aimed at health improvement yet to employees' ability to stay in employment despite health problems.

Key to this is QAC's approach that sickness absence directly related to disability should not be counted towards any targets set in individual cases under the procedure for managing short term / intermittent sickness absence. Furthermore 'Return to Work Interviews' are conducted after each spell of absence to address any potential underlying issues.

For long-term absence, defined as a period of 4 weeks or more, managers have a duty to maintain regular contact with the absent employee, normally on a 2 week basis. However this is implemented upon the discretion of those involved depending upon the circumstances surrounding the individuals' absence from work. HR plays a key role in enabling employees to return to work after periods of absence. Where medical advice is that an employee cannot continue to carry out the duties of their post due to their physical or mental state, the following options are considered by the HR director:

- Re-deployment / alternative employment
- Re-training / Rehabilitation
- Adjustment to working hours
- Alternative employment
- Termination / Retirement on the grounds of ill-health
- Permanent Health Insurance option (if applicable).

In cases where employees present real barriers to returning to work QAC clearly go above and beyond to provide the best outcome for employees. Staff described a holistic, supportive approach to supporting employees with health problems that extends beyond simply returning to work. This includes providing support to ensure highest possible levels of sick pay,

as well as support claiming welfare benefits, securing housing and ensuring employees are covered by continued critical illness insurance post-employment, if applicable.

### **Best practice example 1: Implementation**

Implementation of all Queen Alexandra College measures:

The policies and procedures were not implemented as a result of any collective agreement or specific demand from employees or the business (Director of HR and Estates). Rather they were put in place in acknowledgment of the high profile of mature staff within the college (Previous Director of HR and Estates) and in recognition of the positive contribution a diverse workforce can make (QAC 2013b).

The introduction of the Equality Act 2010 was described as providing a key opportunity for QAC to re-evaluate their approach to equality, diversity and inclusion (Previous Director of HR and Estates). The Equality Act 2010 serves to simplify, strengthen and harmonise the various pieces of legislation that previously existed within the UK in order to protect individuals from unfair treatment. Most notably the Act establishes nine protected characteristics on the grounds of which it is unlawful to discriminate against a person, which includes on the basis of age and age groups. Furthermore the Public Sector Equality Duty under the Equality Act 2010 provides QAC with explicit duties to have due regard to the need to eliminate unlawful discrimination, to advance equality of opportunity and to foster good relations between people who share a protected characteristic and people who do not (QAC 2013b). Arguably most pertinent to the extending of working lives, the Equality Duty explicitly recognises that disabled people's needs may be different from others, and that public bodies have a duty to consider and take reasonable action to accommodate the needs of disabled people, even if this means treating disabled people differently or more favourably (QAC 2013b).

Although the Equality Act and the associated demands of the Public Sector Equality Duty did not entail a major reorientation to QAC's already comprehensive approach to equality, diversity and inclusion, its introduction was described as providing the impetus for adopting a more positive action model (Previous Director of HR and Estates). Most notably the College has recruited, on merit, a proportionately high number of employees with disabilities (QAC 2013b). Furthermore QAC collect and evaluate comprehensive data at both department and College level to assist in evaluating its performance in meeting its high standards of equality. This data is used to inform the annual evaluation of the College's Equality, Diversity and Inclusion Policy for statutory purposes and QAC's Strategic Plan. These evaluations subsequently inform future Action Plans, target setting and staff development. Furthermore the QAC has an Equality and Diversity Steering Group to ensure that QAC delivers to its equality agenda in line with legislation and Codes of Practices (QAC 2013b).

In addition to their adherence to recent legislation, QAC are demonstrably an organisation that takes on board collective agreement and negotiation when implementing change. For

example, due to the increasingly complex needs of their service users QAC have recently begun to implement change which would require all support staff, as opposed to just residential support workers, to provide personal care (Director of Human Resources; Staff Representative; Employee 1; Employee 2). Upon negotiation QAC has subsequently put in place an opt-in scheme rather than making it a compulsory element of certain jobs roles (Employee 1; Employee 2). This crucially provides team members who face barriers to fulfil these new requirements an opportunity to reasonably refuse. This is to benefit of older workers at the College who may face physical barriers to providing personal care.

### **Best practice example 1: Transferability**

QAC's decision to conduct health assessments and individual risk assessments post offer of employment seems crucial to extending the working lives of older people as it makes reasonable adjustments part of their day to day process. This in turn provides a gateway for older workers to be appropriately accommodating in the workplace.

Transferability of all Queen Alexandra College measures:

More stringent mechanisms that assess the level of support and subsequent funding service users need may present a threat to QAC's approach to extending working lives. Arguably less funding and higher demands could reduce the level of flexibility QAC can reasonable offer employees without detrimentally impacting upon the business. That being said QAC has coped well and continues to be seen as a positive place to work by older workers.

There would seem to be a high level of transferability of QAC's general approach to mainstreaming to other organisations in the UK. Given QAC is well versed in supporting those with additional needs the extents to which other organisations have the knowledge and resources to make reasonable adjustments are unclear. Furthermore given that the UK has a strong policy stance that identifies age as a specific protected characteristic as part of the Equality Act 2010, the extent to which this focus on age can be replicated in other countries is unclear.

### **Best practice example 2: North Warwickshire Borough Council (NWBC), UK**

North Warwickshire Borough Council (NWBC) is a local government district and borough council based in Warwickshire, England. NWBC currently employs 477 members of staff, of which 39 per cent are aged 50 or over. NWBC's approach that contributes to extending the working lives of older workers is, largely, one of non-discrimination mainstreaming. This notably includes implementing blanket policies pertaining to flexitime / flexible working, carer's leave, and attendance management. NWBC also provides opportunities for flexible retirement. NWBC is one of very few local authorities in the UK that has not implement widespread redundancies in the face of recent nationwide spending cuts. As such NWBC presents a very specific culture whereby employees are appreciative of the continued stability. This arguably strengthens the 'give and take' ethos that underpins NWBC's approach, and potentially highlights some barriers to these policies' transferability to other local authorities and organisations.

### **Best practice example 2: Description**

#### Non-Discriminatory Attendance Management

Key elements of NWBC's approach to attendance management include:

- Operating a 'Bradford Calculation' based on triggers that enable management to address spells of absence before they become problematic.
- Carrying out return to work interviews after every spell absence to identify any underlining issues.
- Maintaining frequent contact with team members that are sick, including personal visits for long-term absence.
- Offering various forms of rehabilitation, if required. These include phased returns and/or temporarily restricted duties.
- Offering opportunities for retraining and/or redeployment, including part-time working, flexi-time / flexible working as well as demotion, if appropriate.
- Being open to any other course of action relevant to the individual circumstances. This includes conducting a review into the causes of absence that may lead to changes in work arrangements that can help remedy or alleviate the situation.

The overriding aim of NWBC's approach to attendance management is to ensure a healthy, productive workforce. These provisions support older workers to extend their working lives by maintaining employee-wellbeing through the promotion of work-life balance, and ensuring a fair and consistent approach to managing employee attendance regardless of age.

### **Best practice example 2: Implementation**

Implementation of all North Warwickshire Borough Council measures:

The policies and procedures outlined were not implemented as a result of any collective agreement, or specific demand from employees or the business. Rather they were put in place in recognition of the contribution a diverse workforce can make to the organisation, and how the proper provision for employees with external responsibilities is a vital ingredient in promoting equal opportunities (NWBC 2014a).

The Equality Act 2010 is identified as key piece of legislation throughout the policy documentation (NWBC 2014a; 2014b; 2014c). The Equality Act 2010 serves to simplify, strengthen and harmonise the various pieces of legislation that previously existed within the UK in order to protect individuals from unfair treatment. Most notably the Act establishes nine protected characteristics on the grounds of which it is unlawful to discriminate against a person, which includes on the basis of age and age groups. Furthermore the Public Sector Equality Duty under the Equality Act 2010 provides QAC with explicit duties to have due regard to the need to eliminate unlawful discrimination, to advance equality of opportunity and to foster good relations between people who share a protected characteristic and people who do not.

The introduction of the Equality Act 2010 and the associated duties under the Public Sector Equality Duty, however, did not entail a major reorientation to NWBC's approach to equality. Having previously operated under the Equality Standard for Local Government framework, the Council was well versed in mainstreaming equalities across all policies, functions and services to encompass race, gender, and disability issues. This was notably through the development of Equality Scheme Action Plans (HR Manager). What the Equality Act 2010 did do, however, is formally identify age as a protected characteristic, as opposed to an issue upon which equality could be, and indeed was, extended to (HR Manager). As such the Council embarked upon a process of review whereby their overall approach to improving equality and diversity was extended. In line the requirements of the Public Sector Equality Duty NWBC publish information to demonstrate their compliance. This provides an evidence base upon which NWBC can understand the impacts of their policies and practices on different protected groups and plan more effectively (HR Manager).

### **Best practice example 2: Transferability**

Much can be learnt from NWBC. These include:

- The value of clear, transparent HR policies and how they can foster good relations between organisations and their employees;
- The value of pre-empting demand and progressively addressing gaps within national provision to foster good relations.

- The value of supplementing broader flexible working policies with specific provisions that instil a hierarchy of need. This pre-emptively addresses any concentrates of any absence, mitigating the risk they pose to the organisation.
- The value of predicating policies on employee initiation. This ensures organisations are made aware of potential reasons for absence early on (i.e. caring responsibilities), and can facilitate appropriate forward planning.
- The value of strong leadership that clear and consistent messages regarding equality which foster a culture of inclusiveness and fairness throughout the organisation.

All identified provisions will continue to be implemented in foreseeable future.

### **Best practice example 2: Innovation**

By conducting reviews into the causes of absence and being open to any course of action that may support employees with disabilities and/or health problems to work, NWBC demonstrates a high degree of flexibility that ensures progressive solutions. In addition to this by using data to provide an evidence base upon which they can plan for the future, NWBC ensures all stakeholders are integrated into the process of enabling older workers to extend their working lives. This is supplemented by the positive role and attitude senior staff has to extending working lives, which creates an organisational culture that demonstrates a readiness and ability to monitor their progress and create change.

### **Best practice example 3: Asda Stores Limited, UK**

Asda is an American-owned, British founded supermarket retailer. With over 175,000 employees, Asda is the second-largest supermarket chain by market share. Headquartered in Leeds, West Yorkshire, Asda has 525 retail stores and 24 depots positioned across the UK. Asda's approach that contributes to extending the working lives of older workers is, largely, one of non-discrimination mainstreaming, comprising of key policy areas such as the provision of multiple forms of unpaid leave, opportunities to adjust working patterns, age neutral recruitment and a comprehensive approach to absence, health and wellbeing. The main driver behind Asda's success in extending working lives lies in its commitment to equal opportunities. Key barriers to transferability lies in Asda's large size and its ability to accommodate both the administrative and day-to-day impacts of offering such extensive provision.

### **Best practice example 3: Description**

## Absence, Health and Wellbeing

Asda operates a standardised approach to managing colleague attendance that makes a clear distinction between persistent short-term absence and prolonged absence. For persistent short-term absences whereby there is no underlying medical condition the company sets out standardised calculation that provides triggers for investigation. This consists of discussion regarding absence, referrals to Occupational Health, and various forms of on-going support under the Health and Wellbeing Policy, if applicable. Asda's Health and Wellbeing policy specifically details courses of action for colleagues with prolonged sickness absence. The policy is primarily based upon the principle of ensuring colleagues are aware of the support available. This includes making reasonable adjustments to accommodate return to work and ensuring continuous and high level support. The types of reasonable adjustments made include:

- Reviewing and adjusting working hours
- Current role review
- Review of vacancies for suitable redeployment. This is reinforced by the multi-skills Asda encourages, particularly within retail.
- Phased return to work
- Alteration to premises or equipment
- Flexibility over break times and any specific arrangements needed
- Allowing flexibility to attend medical appointments.

In addition to this Asda also has a pre-emptive approach to mitigating absence through injury. Occupational health specialists are provided on site at depots, for example, which enables colleagues to visit when needed to address any underlying health concerns.

In addition to these mainstreamed policies, Asda also operates a retirement policy that aims to ensure colleagues who retire experience a smooth transition when leaving the business and that they are recognised for their length of service and achievements over the course of their employment. There is a strong cultural narrative of respect for the contribution older workers make to Asda, which is reflected by the benefits colleagues receive whilst still working and upon retirement. Asda employees are enabled to transition to retirement through requesting to work reduced hours or to go into an hourly paid / less senior (if applicable). Asda does not have a retirement age and therefore enables employees to work for as long as they wish. As such discussions regarding retirement are entirely employee-led. This clearly allows an open gateway in which older workers can continue their employment for as long as they see fit.

### **Best practice example 3: Implementation**

## Implementation of all Asda measures

The driving force behind Asda's approach to non-discrimination mainstreaming stems from a long-standing commitment to equal opportunities. Widely recognised as an age positive employer, Asda has been frequently identified as a case study of good practice on age diversity (CIPD 2007; DWP 2011; DWP 2013). As such Asda has a history of reviewing its policies and procedures in order to address equality and diversity. This notably includes reviewing and re-launching its new flexible working programme in 2008 (DWP 2011). In line with this the introduction of the Equality Act 2010 has been key to Asda's approach. In response to the Equality Act 2010 Asda set up five their internal, cross-functional Diversity Steering Groups that work toward the company's goal of becoming a more diverse business (Line Manager). These fives strands are Gender, Age, Disability, LGBT and Ethnicity. Key to this is Asda's gathering and consideration of relevant data whereby they assess their existing available evidence and also consider what other evidence they might need to help them make progress in meeting equality (Human Resources).

### **Best practice example 3: Transferability**

#### Transferability of all ASDA measures

Asda's wholesale approach to inclusion and diversity is a clear strength which considers the equality of older workers in every aspect of its operation. From recruitment to retirement Asda instils a level of consideration and flexibility that mitigates disadvantage at all levels, enabling older workers to extend their working lives. In particular the combination of various forms of unpaid leave and the many opportunities employees have to work flexibility demonstrates well-rounded provision that ensures those on lower incomes can also achieve a better sense of work-life balance.

A potential weakness of Asda's approach could be the extent to which its policies and procedures *equally* extend the working lives of older people throughout the numerous occupations and positions its holds. Whereas their seems ample opportunities to retrain, redeploy and work flexibly within, and even in between, retail and logistics, positions within the Home Office present very different challenges. As such the age profile within the Home Office would appear to be on average much younger than elsewhere in the organisation. This in part will be due to income differences between the Home Office and elsewhere in the organisation, and a certain amount of self-selection out of the organisation as Home Office employees can retire earlier. However, the visible presence of a younger profile within the Home Office may contribute to an expectation of older workers role, or lack of.

### **Best practice example 3: Innovation**

Asda presents a highly innovative approach to extending the working lives of older workers that seeks equality not only within the workplace but also within wider society. By continually seeking out opportunities to further develop an inclusive workplace as well as addressing broad social issues, Asda demonstrates a high level of awareness of the importance of equality within and outside the workplace that serves to address the many potential barriers older people may face in extending their working lives.

#### **Best practice example 4: Stowarzyszenie “Radomskie Centrum Przedsiębiorczości” (RCP), Poland**

Stowarzyszenie „Radomskie Centrum Przedsiębiorczości” is an independent non-governmental organisation located in Radom (Mazovian voivodship, Poland), which is active in fields related to social activity, social inclusion and social development, and its main aim is supporting small and medium enterprises. The organisation benefits from a long experience in those fields, since it has been created in 1994.

The RCP’s mission is to support social initiatives which aim at preventing unemployment and its consequences as well as support and promote economic enterprises and entrepreneurial people which act towards the economic development of the city of Radom, of the voivodship of Mazovia, as well as the local labour market.

Concretely, the association acts in different ways: it provides help to people wishing to set up a business; it provides information and knowledge on the topics of entrepreneurship, business creation and free trade economy through the organisation of trainings; it organises informative and promotional campaigns towards entrepreneurship and economic development; it encourages potential entrepreneurs to focus on underexploited economic fields in order to support sustainability and variety of the economic landscape; it creates and takes part in local partnerships; and lastly, it takes action in providing adapted workplaces for people with disabilities or people from difficult backgrounds. The RCP also provides training and financial services in the form of microloans for small and medium-size enterprises as well as individuals wishing to set up a business, and public institutions. The RCP acts under its own potential and existing local, regional and national institutions. The RCP actively supports local initiatives aiming at creating new job positions through an incubator for entrepreneurship.

The RCP collaborates with national and international institutions whose organisational and financial help contributes to the economic development of the region. It also collaborates with other NGOs, labour market entities and organisations, institutions focusing on social help and inclusion, local governments, national administration as well as research institutes and universities. The RCP is a member of the national network of entities working on the promotion of entrepreneurship in Poland (KSU), which works under the patronage of the Polish Agency for the development of entrepreneurship (PARP).

#### **Best practice example 4: Description**

For the period 2013-2015, the RCP realised a project on the employment of disabled people which aimed at boosting the employment of disabled people who are looking for employment in the voivodship of Mazovia. In the framework of this project, educational trainings as well as professional and psychological counselling were provided.

#### **Best practice example 4: Implementation**

As far as the collaboration between older and younger employees is concerned, it is seen as very fruitful and harmonious, although the interviewee mentioned an issue which concerns the stability of employment. Indeed, the Association provides experience and skills to its younger employees with the objective for them to replace the older ones in managerial positions. However, practice shows that younger people are more interested in the execution of projects and initiatives than in strategy planning. As a matter of fact, as soon as the opportunity of a bigger city, a bigger company or a higher salary is given to a young employee, he takes it, regardless of the needs of the RCP. The interviewee mentions the rules of the labour market and the current trend among young people to often change jobs as a reason for this phenomenon.

#### **Best practice example 4: Transferability**

The programs and initiatives implemented by the RCP have positive outcomes, and therefore could be transferable to other companies or organisations, on the condition that infrastructure and funding are available. Since the RCP uses external grants and funding to implement its initiatives, the projects' transferability also would depend on additional funding. As mentioned above, the RCP experienced difficulties with transferring their initiatives on active ageing in rural areas, since the target group is not responsive to initiatives extending working lives.

#### **Best practice example 4: Innovation**

Even though the projects implemented by the RCP are objectively innovative, we notice that they need to cope with socio-cultural barriers related to the relative novelty of the debate on extending working lives, especially in rural areas.

## **Best practice example 5: Sozial-Holding der Stadt Mönchengladbach GmbH, Germany**

### **Best practice example 5: Description**

Despite using auxiliary means, physical strains cannot always be diminished adequately to the needs of the employees. In cases when employees are not capable anymore to work as an elderly care nurse substitution workplaces can be offered. The “Betreuungsassistentz” (care assistant) is funded by the public health care and does not cover the typical caring tasks but focuses on social aspects and support for the daily routine of the resident. This way a handicapped employee can stay employed, even within the same company.

### **Best practice example 5: Implementation**

See ‘Description’.

### **Best practice example 5: Transferability**

Companies/organisations have to large/diverse enough to offer alternative tasks for employees whose health impairments disallow them to continue fulfilling their prior tasks. Further, in some cases either downward wage mobility is necessary (if the new task belongs to occupations with lower pay) or the companies/organisation has to accept comparatively high wage costs for the new task. Possibly incentives for companies/organisations are higher if employers have to bear part of the costs resulting from occupational disability as e.g. in the Netherlands (National Policy Report page 94 <http://mopact.group.shef.ac.uk/wp-content/uploads/2015/08/D3.2-Extending-working-lives-Policy-Report.pdf>).

### **Best practice example 5: Innovation**

The measure is not innovative under common standards, yet worth imitating by other companies/organisation to prevent. Public incentives as e.g. in the Netherlands can be supportive, yet effects on hiring should be ascertained (if employers have to bear part of the disability costs they could be motivated to stronger pre-select according to potential risk of disability during hiring).

### **3 LifeLong Learning**

#### **Best practice example 1: Wojewódzki Ośrodek Ruchu Drogowego (WORD), Poland**

##### **Best practice example 1: Description**

WORD provides to its employees a wide range of training opportunities (eco-driving, first aid, accounting and foreign languages courses, etc.), which are offered once a year to the employees. However, there are no specific trainings for older people, except the ones aiming at improving their professional skills.

##### **Best practice example 1: Implementation**

Since there are no specific trainings for elderly workers, the topic of the implementation of lifelong learning for older workers cannot be approached.

##### **Best practice example 1: Transferability**

The training opportunities offered by WORD to its employees are easily transferable to other organisations or companies willing to implement these kinds of activities.

##### **Best practice example 1: Innovation**

Since there are no specific trainings for elderly workers, the topic of innovation in the context of lifelong learning for older workers at WORD cannot be approached.

#### **Best practice example 2: Confindustria Veneto SIAV S.P.A., Italy**

##### **Best practice example 2: Description**

The initiative of Lifelong Learning for the use of the Technology Road Mapping gives one of the most recent examples of training and intergenerational cooperation through innovation initiatives. The Technology Road Mapping is aimed at identifying a series of needs and the technologies required to satisfy those needs. It helps forecasting technology developments and provides a framework to help to plan and coordinate technology developments.

37 companies were involved in this initiative, coming from the cold electric household appliances sector, together with students from the Faculty of Engineering of the University of Padua. The students had worked on Technology Scouting, identifying emerging technologies in the sector, and on developing a Technology Road Mapping. They presented the results of their research to an audience of older managers working in these enterprises, who were able

to understand the potential of the research and eventually to integrate some of the students and their ideas into the firms. SIAV is convinced that the key to success for the firm is a mix of younger talent with the expertise of older workers.

For that purpose, Confindustria Veneto SIAV also linked firms with technological research centres. For instance, older employees of eight firms from the metal mechanic sector were accompanied into the technological park called 'Galileo' in Padua (<http://www.galileopark.it/en.html>). They spent a morning learning about new materials and an afternoon talking with students of the Industrial Design School <http://www.scuolaitalianadesign.com/>, which is located nearby. The first result was that the participants from the firms, who were all over 45, engineers but also entrepreneurs, could understand the impact that the new materials would have on their sector and their production processes and some of them have started to implement changes inspired by this day. The second result regarded the design. Older workers became aware that young designers were no longer interested to work only in Milan, considered as the centre for design, but that they were available to join local firms and develop products together with those experienced workers.

### **Best practice example 2: Implementation**

The rationale behind these initiatives is to integrate the younger generation, who has strategic knowledge (e.g. about new materials, new engineering processes), with the older one, who have knowledge of the firm and of the production process and who can transform this new knowledge into a value added for the firm. This integration engenders thus an upgrading of the competencies of older workers, which enhances their strategic value, their productive contribution and boosts their work motivation.

In a globalised world where the competition between firms and territories has become fiercer, Confindustria Veneto SIAV is strongly promoting the investment on human capital. According to its managing director, innovation through human capital is of utmost importance to keep pace with the increased competition in a land that is otherwise scarcely attractive. Italy and the Veneto region only succeed in attracting foreign investment and brands because of the high degree of expertise they present in specialised sector. Therefore, innovative initiatives aimed at motivating older workers, transferring knowledge to and from older persons, developing intergenerational cooperation and favour human capital accumulation, represent a value added for the whole regional territory.

### **Best practice example 2: Transferability**

According to the specificities of the territory in which firms are settled, this kind of initiatives can easily be replicated. In order to make the most of new knowledge and technology,

Confindustria Veneto SIAV in accordance with businesses provided intergenerational cooperation which became a source of lifelong learning.

The cooperation between research centres and companies, which is a main specificity of this initiative, exists nowadays in several contexts. The role of Confindustria Veneto SIAV was to channel this cooperation into a specific sector (i.e. age management of the workforce). Other service agencies will very well be able to replicate these initiatives according to the needs of companies in their territory.

### **Best practice example 2: Innovation**

Innovation and new technologies and older workers are often perceived as contradictory terms. Confindustria Veneto SIAV, by promoting and supporting older workers in innovation processes through intergenerational exchange and learning, shows, in opposition to what is usually expected, that older workers still have an innovative role to play in the knowledge transfer to younger generations of workers, within firms.

### **Best practice example 3: UniCredit Group, Italy**

#### **Best practice example 3: Description**

A survey highlighted a widespread need of (even vocational) training activities expressed by the company's older workers. This is due to the fact that participating in training activities was seen by older workers as a mean for developing/upgrading their skills, and, in this way, as an opportunity to retain useful human resources for the company even in the future. Therefore, the core of the project consisted in a broad and diversified supply of training courses for the main target group, with attention devoted to a life course orientation/lifelong learning perspective. More in detail, in November 2013 the company has set up and launched about 40 typologies of training courses, covering different topics/areas (i.e. banking technical-professional issues; management; foreign languages; well-being and welfare; behavioural and relational aspects) to respond appropriately to the specific needs expressed by workers over 55, and for valuing and developing their professional competencies. At the end of 2013 and mainly all of 2014 UniCredit realised training activities and implemented concrete actions and interventions for valuing and strengthening the working motivations of older workers and for promoting both a new older workers' management and an organisational change related to this (e.g. Temporary Manager, tutoring and mentoring initiatives). Most of these training activities offered to older employees have been provided by the training centres of the company located in various Italian cities (e.g. Turin, Milan, Verona, Bologna, Rome, Naples, Palermo). The courses have been offered through training modules on-line (i.e. by the so called "My Learning" training on-line system) and many of them have also been organised "live", while others in form of classroom courses within the company's training centres or

(others) in meetings/workshops (of 2-3 days) in training centres located outside the company. Training courses provided on-line were available for all older employees. The latter were free to choose the kind of training modules, according to specific working needs and interests. Other training activities were offered after the project's coordinating team evaluation processes, that selected the older (and younger) attendees on the basis of some criteria, as, for example, their working roles (e.g. managers, directors of company's branches/banking districts, etc.), experience, know-how, interpersonal and communication attitudes and abilities (e.g. important in training courses to become a mentor, in workshops devoted to older employees with leadership attitudes, etc.).

Some training modules/courses offered "live" (e.g. classroom courses) have been carried out by employees selected by UniCredit according to their skills and/or working roles as experts/trainers. In other cases the trainers/"facilitators" were both company employees and experts/consultants employed by an external consulting and training company focused on lifelong learning activities, "MIDA", with which UniCredit has a collaboration for a long time.

Some of the training activities provided within the project were linked to the necessity for older workers to acquire new competencies/skills and to be updated given the continuous and deep changes in the banking working environment. These activities were focused on the following aspects: basic and advanced computing skills updating; new technological tools of the "multichannel" bank; risk management issues (e.g. in risk related to credit, markets, liquidity, as well as the regulatory framework of these issues); intergenerational tutoring.

Other training initiatives realised within the project were interventions aimed at supporting the management of change, for example through meetings/workshops for thinking over the leadership in times of crisis, or training activities for mentors. Initiatives targeted solely to company's older workers were workshops about

a) the issue "seniority" and its values

b) ideas on possible new organisational changes/new products to cope with senior customers' needs.

The first workshop (in line with evaluations made by older employees after other training courses) highlighted, for example, that senior workers were willing to be active and useful resources for the bank, even though they perceived a lack of attention towards their needs and working expectations before the implementation of this project. The second workshop provided to the project's coordinating team some suggestions on how to better target specific needs of senior costumers (e.g. developing a deeper "customer segmentation", even by age, for example associating "dedicated" older workers/consultants to senior costumers). These suggestions have been taken into account by the company for supporting some organisational/operational changes in this regard.

The last available monitoring data of the project (updated at June 2014) show that the initiative has had very positive results: amongst the high number of older workers (i.e. more

than 5,500 out of 10,000 employees over 55) who accepted to participate voluntarily in the survey, over 3,111 employees (most of them older workers) have been involved in training and related activities (e.g. they participated in at least one training module), with a total of 3,154 training hours provided (training hours counted as 1 hour = 1 hour of course/lecture given, not as 1 hour received by 1 person). Both these figures are well above the minimum targets established by the funding organisation to which the company applied in order to get funds for the project (i.e. 2,100 people and 2,650 training hours by the end of June 2014).

It has to be underlined that older employees participating in training courses had concrete positive benefits for their job, since they were able to carry out their working activities using new/updated competencies and skills acquired through training initiatives, useful to cope with the changing and complex working environment within the bank. For example training courses in computing provided technical/digital updated information and tools in order to strengthen the ability of older workers in using new ICT services (e.g. home banking platforms) increasingly important for working in a modern bank.

Other training initiatives supported older workers in performing new tasks and/or to transfer their know-how and experience for the benefit of (mainly young) colleagues. For example, it is the case of older people trained as mentors, tutors (or Temporary Managers), that had the opportunity to implement concretely the knowledge acquired in “dedicated” training courses, with positive results in terms of personal working motivations and usefulness perceived for themselves and for colleagues supported/helped.

### **Best practice example 3: Implementation**

See ‘Description’.

### **Best practice example 3: Transferability**

The transferability to other companies (or contexts, e.g. other countries) of training courses and lifelong learning initiatives is similar to those developed under the “Being Senior in UniCredit” project for its older workforce, is not entirely easy. Indeed, the range of training activities offered by UniCredit is very articulated and for this reason, if other companies would like to implement an analogous training programme, they would need a certain amount of economic resources/funding to cover costs of training activities. These costs are affordable mainly by large companies or thanks to the availability of adequate external funding sources, as in the case of UniCredit. Another limitation to a wide transferability of such training project is that many training courses/issues are specifically targeted to employees of the banking sector. The latter obviously also means that this programme could be easily transferable to other banks, for the benefit of their workforce. Anyway, more in general, the “worker-centered approach”, chosen and used by UniCredit for designing and providing training courses and lifelong learning to older employees may be quite easily transferable to other

companies (of the banking sector, or operating in different economic sectors), even though they have to be adapted to specific needs of workforce employed in such companies. In conclusion, this training program may inspire other companies in developing training courses for older workers, taking into account their specific needs, as in the case of UniCredit.

### **Best practice example 3: Innovation**

The training activities for older workers developed under the “Being Senior in UniCredit” project are absolutely innovative in the Italian context. In essence, this lifelong learning programme is unique for the wide number and articulation of the training courses offered, covering several issues and available/provided in different and flexible ways (e.g. on line, classrooms, workshops, etc.). Furthermore, the number of employees (mostly older workers) involved in training courses was very high, and the participants (as stated above) benefited of the new acquired knowledge in their daily work, even in terms of increased working motivation. The interviewed coordinator of the project pointed out that one very important and innovative aspect was the possibility to involve in training courses so many older (and young) workers, usually exclusively focused (as requested by the company’s management) in doing the “classical” commercial activities related to the banking sector.

### **Best practice example 4: Sozial-Holding der Stadt Mönchengladbach GmbH, Germany**

#### **Best practice example 4: Description**

Sozial-Holding has about 20 apprentices every year. Most of them do an apprenticeship as elderly care nurse. Some apprentices want to reskill and/or are placed by the Federal Employment Agency. Thus, the age of apprentices ranges from 18 to 50 years. This is seen as an advantage by apprentices because their experience of life facilitates empathy and helps them to better understand the needs and the behaviour of the residents. Also, it helps to better cope with the task of caring and to set boundaries between the straining work and private life. The company confirms the positive experiences with employing older apprentices because older apprentices are more ambitious to complete the qualification with good results.

A key factor to increase the usage of health offers and to improve the health status in general is leadership – this was the result of an internal survey about the reasons for not taking part in vocational training. To cope with the current and future challenges in the care sector and to enhance the participation in vocational training of the employees the project TOP was initiated. “TOP” stands for team oriented personnel development and consists of five phases:

- Creation of competence profiles on institutional level and living area level

- Promotion of human resource development competencies in lower and middle management level
- Analyses of training needs at the team level
- Development and implementation of adequate and if possible work-related training opportunities
- Evaluation and continuity of personnel development

The project was carried out for three years between 2011 and 2014. It was funded by the European Social Fund and the Federal Ministry for Labour and Social Affairs. The results of this project were integrated into the leadership measures.

#### **Best practice example 4: Implementation**

See 'Description'.

#### **Best practice example 4: Transferability**

External funding (by the ESF) has been used; it is not clear if the measure would have been implemented without external funding. Analyses of competencies and analyses of training needs at team level are transferable to other companies/organisations; this also applies to work-related training opportunities.

Also the acceptance of older apprentices is transferable. Due to longer working lives (e.g. caused by improved health status and pension reforms) pay-off periods with older apprentices can be very long. Further, probabilities of changes of employer are lower with older employees, so probability that is the same company reaps the benefits of the apprenticeship is higher. Somewhat differently, also a German bank (Ing-DiBa, page 175 under <http://mopact.group.shef.ac.uk/wp-content/uploads/2015/08/D3.2-Extending-working-lives-Best-Practice.pdf>) successfully employs older apprentices.

#### **Best practice example 4: Innovation**

Further training for older employees and especially apprenticeships for older employees are still rather uncommon; this also applies to the systematic analysis of training needs. Training on the job is considered adequate concerning older employees' needs, yet still this kind of training is not widespread.

### **Best practice example 5: InfraLeuna GmbH, Germany**

#### **Best practice example 5: Description**

Measures of occupational qualification and further training are considered preconditions for success. Via its offers, InfraLeuna enables its employees to sustain and to extend their skills and to adapt their skills to the company's technical and societal developments (collective agreement „Zukunftssicherung“ 2012: 2f.). Primarily due to the partly highly specialised jobs and the projected de-manning, knowledge transfer is necessary (Interview HR department 2015).

In order to limit de-manning, since 2007 there are analyses of work places. Part of this is the planning of the time of retirement and questions related to the acquisition and time of initial training of new employees. Internal job advertisements offer possibilities to younger employees for further developments and can possibly prevent fluctuation to other companies after apprenticeship or study (Interview HR department 2015).

Offers for further training are open to all employees to the same degree and across the whole tenure. There is no differentiation according to age (Interview HR department 2015).

There is an annual planning of further training with a fixed assessed budget. Beyond legally required measures, employees and leaders have the right of initiative to demand further training measures (Interview works council 2015).

The further training offers are designed in agreement with the works council. Further, in the context of appraisal interviews employees' needs for further training are ascertained and agreements concerning further training are met. After further training participation all participants give feedback concerning the quality of the further training course. This happens via the form sheet "Erfolgskontrolle Weiterbildung" ('Efficiency Review Further Training') to superiors and the HR department (Interview HR department 2015).

For the sake of career planning the annual appraisal interviews are used to show possibilities for promotion. Due to the wider range of operations, employees have e.g. the possibility to experience other fields of work. For succession planning a planning period of five years is envisaged. Activity analyses are the basis for this (ibid.).

Besides subject-specific further training there are cross-departmental courses, e.g. addiction prevention for apprentices, language courses, course for communication and project management and e.g. for MS Office applications (ibid.).

### **Best practice example 5: Implementation**

See 'Description'.

### **Best practice example 5: Transferability**

The structured and evaluated lifelong learning measures are transferable to other circumstances. The collective agreement is not a crucial precondition.

### **Best practice example 5: Innovation**

The whole chain of further training proceedings from planning to evaluation is a comprehensive set of integrated steps. The level of professionalism is remarkable for a company of this size and shows that good lifelong learning measures can be adopted in smaller companies.

### **Best practice example 6: Polska Agencja Rozwoju Przedsiębiorczości (PARP), Poland**

PARP is a governmental agency, which means that it is financed by and collaborates with the Ministry of Economy and the majority of its projects are realised under the scope of the latter. However, some of the projects are managed by PARP only or directly by the European Commission. Thus, PARP receives political and governmental support as well as formal lobbying support. The driving forces programmes at internal level are the department of Human Capital Development and the different training departments.

PARP also collaborates with other entities such as businesses and institutions providing services to businesses, as well as research institutes and universities. The Agency (PARP) also ensures collaboration between other entities of the business world. Thus, it developed a database linking Polish and foreign companies in order to facilitate project partnerships and consortia.

PARP does not implement any internal policies in the direction of active ageing, since the average age of its workers is around 38 years old. However, PARP encourages businesses to hire and extend the working lives of workers aged 50+. Through its projects and initiatives, PARP also contributes to the economic activation of the elderly through trainings and the provision of information aiming at business creation.

PARP is financed mainly from EU funds in collaboration with the Polish Ministry of Economy.

### **Best practice example 6: Description**

According to a survey made by PARP, an increasing number of business owners think that people over 60 are an important target group, but only 28% of business owners are willing to

invest in structural changes aiming at adapting their offer to this new type of consumers. In addition, more than 60% of institutions acting in the field of professional training in Poland do not realise any specific trainings targeting people over 50.

PARP invests in the professional education and training of people over 50 and created the PARPS' Academy, which is providing e-learning – in the framework of the Operational Programme for Human Capital – in the form of professional trainings. This e-learning programme is available for all professionals regardless of age, but PARP created a specific training targeting people over 50.

In 2012, PARP realised a project on professional counselling and retirement dedicated to people close to legal retirement age. The project was dealing with the issue of lost skills, i.e. the project was tackling the issues of skills that a worker acquired in the past but lost it throughout the years after not having used them or after having obtained new competencies in the meantime.

### **Best practice example 6: Implementation**

Implementation of all PARP measures:

The Agency produces yearly human capital reports, which present the overall working population's level of competence in different fields of the economy. On the basis of these reports, PARP analyses future competencies and skills that will be focused on for the coming years in the business world and observes growth or decline in the quality or quantity of certain skills compared to the previous year. These reports are used to build recommendations regarding the professional's career development as well as companies' growth.

The specific interest for the economic and professional activation of people over 50 is a direct consequence of those reports' findings. Therein, PARP created a project in 2013 in the form of a call for proposals financed by EU funds on the subject of professional development. Numerous proposals received were focused on the topic of active ageing, employment activation of people over 50, or extending working lives beyond legal retirement age.

As a future project, PARP is preparing a programme for the development of professional skills which also includes people over the age of 50.

### **Best practice example 6: Transferability**

Transferability of all PARP measures:

The elderly-friendly projects that PARP supported and financed had overall positive outcomes among the target group of people over 50 looking to set up their own business.

PARP deals with some barriers to the development of its projects. For instance, some of the programmes the Agency wishes to develop are rejected because of a lack of interest, a lack of funding, or when the proposal does not match the current priorities of the Ministry. Another barrier mentioned by the Manager of the Human Capital department is the overall mentality and tendencies of the Polish culture, since motivating people over 50 to maintain an active professional life or to set up a business is a challenge. Lastly, a lack of independence is a barrier.

### **Best practice example 6: Innovation**

The innovation aspect of PARP's initiatives is not obviously noticeable. The reports produced by PARP are thorough and comprehensive, and their contents are a reliable basis for further innovative policies and initiatives held by other entities such as associations, organizations, and governments.

### **Best practice example 7: Eesti Energia, Estonia**

#### **Best practice example 7: Description**

Training programmes

The company has its own development and competence centre where training programmes and basic principles of training are elaborated. The company has elaborated special development programmes for business critical occupations that are: engineers, production managers, project managers and internal trainers. Every year the company reviews the current situation, sets new goals and activities to ensure that occupations vital for the company are fulfilled with talented, professional and committed employees. For example in 2014, the company focused on the training of project managers and launched an extensive development programme for them. The programme included three modules:

- 1) project management
- 2) people management
- 3) self-management

The company pays a lot of attention to internal training and internal trainers. Most of internal trainers are experienced workers who are also good trainers (know how to teach) in addition to their occupational professionalism. Additionally, the company provides necessary and continual training throughout working life to all employees (e.g. courses to improve computer skills). The company is systematically designing the work environment inspiring personal development and supporting employees in achieving improvement goals.

Mentorship and on-site training

Older and experienced workers are mentors for their younger colleagues who have moved up in their career ladder. This helps to keep and share the valuable knowledge in the enterprise; in addition, some of the workplaces in Eesti Energia demand very specific skills/knowledge, which are not taught in universities, therefore young and inexperienced workers will have on-site work training under older and much more experienced workers. Experienced employees who will be mentors or on-site trainers usually have training before they start with their mentoring or on-site training. The training includes basic management skills and other important issues such as how to train (e.g. different skills regarding communication, performing (for this, external experts are sometimes used).

Also, employees get additional remuneration for being a mentor and/or trainer.

#### Re-training scholarships

The company has set up a retraining scholarship fund for employees who have been made redundant due to economic circumstances, but who have not been able to find new jobs. During the period they have the right to receive unemployment insurance benefit.

### **Best practice example 7: Implementation**

Eesti Energia Group has 5 affiliates (Eesti Energia Õlitööstus AS, Elektrilevi OÜ, Eesti Energia Kaevandused AS, Eesti Energia Narva Elektri jaamad AS, Eesti Energia Tehnoloogiatööstus AS) and has holdings in several other companies. Therefore, the company's range of initiatives targeted at its' employees is very wide. General personnel management practices are created centrally. However, in addition, there are several trade unions in the company that have concluded different collective agreements. While the company aims to harmonise the collective agreements, there are still some differences between the affiliates. Therefore, the measures presented in this case study do not include all the measures the company has implemented, but mainly the ones that are more involved with keeping older workers in the labour market. Overall, employee commitment and job satisfaction survey conducted in 2014 indicates that 80% of employees appreciate the benefits offered by the company.

The average age of Eesti Energias employees' is currently around 45 and 69% are older than 40 years old (data for 2014). To make matters more complicated, Eesti Energia's mining and production takes place in Ida-Virumaa region, where most employees are older than 50 years and where it is difficult to find new employees, since the region is not attractive for young persons, who have graduated university. The company strive for diverse workforce and values all of its employees.

Hence, the company has to think about ageing workforce and how to maintain company's sustainability in a longer perspective. Therefore, the company makes twofold efforts: on the one hand they are engaged in attracting more young people to study technical professions and specialities critical for the company to ensure necessary workforce in the future and on

the other hand they are also focused on keeping their current qualified labour motivated and satisfied to minimize the risk of labour shortage.

### **Best practice example 7: Transferability**

The measures form a whole, but independently are easily understandable and can be sustainable and transferable; however it mostly depends of the size of the company and financial resources. Small companies do not have enough financial and human resources to invest in and implement most of the measures

### **Best practice example 7: Innovation**

Although measures are elaborate and have been designed and put together taking into account the company's specifics, the measures are not innovative, but rather adjusted to serve companies needs the best way thereby also considering employees' needs.

### **Best practice example 8: Experience Certificate (*Ervaringscertificaat*), Netherlands**

The Certificate represents an independent document to achieve a range of lifelong learning outcomes. It is an instrument to validate skills and competencies that an individual has gained through formal, informal or non-formal learning in various settings. Recognition and validation of previous learning or work experience is important to make the potential of the individual development visible and to improve the human capital management in companies.

### **Best practice example 8: Description**

The experience certificate provides an overview of prior learning acquired through formal education and on the job, but also of skills and competences gained for instance through volunteering. The aim is to increase the employability of individuals by describing these outcomes in a Certificate of Experience. The Certificate can be used as the basis for formal qualification, further informal or non-formal learning and for further career development, but also for obtaining exemptions in education and training programmes (on the condition that the individual has met all the required learning outcomes that were defined for this qualification) (Duvekot, 2014).

Although the Certificate is targeted at persons of all ages, the instrument is especially valuable for older workers, because they often acquire skills and competencies on the job, but lack the certificates to prove it. The Certificate is also aimed at individuals who are unemployed and seeking employment or (further) training or education. The Certificate can be especially useful

making the individual “ready for job search” as soon as layoffs occur. Because the Certificate provides potential employers a broader set of information about the applicant’s skills and experiences, comes in a standardised format and from a certified source, it can increase the chance of employment. Moreover, it can also stimulate labour mobility for the already employed who would like to improve their position at the workplace or to switch to another job. The Certificate provides employers more insight into the employees’ capacities which helps to create a better match with occupational profiles or learning programs on the job, and shortens the duration of training (OECD, 2014). Thus, the Certificate also prevents unnecessary double learning and training and lowers the real costs of vocational education and training.

The Certificate is included in a growing number of collective labour agreements in several sectors. The number of people obtaining the Certificate has increased from 9,900 in 2007 to 15,700 in 2009 (Duvekot, 2014). In 2011, 17,700 persons received the Certificate (OECD, 2014).

### **Best practice example 8: Implementation**

The Experience Certificate can be obtained through a formal accreditation process. The Dutch Knowledge Centre for Accreditation of Prior Learning (Kenniscentrum EVC) is in charge of overseeing this process. The Centre, established and funded by the Dutch Ministry of Education, is responsible for the management, dissemination and validation of APL in the Netherlands. The Certificate itself can only be obtained from a certified APL provider. In the Dutch APL system, in principle, any organisation can become an APL provider given that they work according to the APL quality code and are evaluated by an evaluating organisation (Kenniscentrum EVC Website). Currently, there are 70 APL providers in the Netherlands. The quality code for APL itself aims to achieve more transparency and comparability and to make APL more accessible. The evaluation is demanded every 18 months and for every domain of standards of the APL-provider (for example finance or logistics). The providers that are certified can register in the National Register for accredited APL-procedures within a specific domain or sector.

It takes about three months to complete the Experience Certificate. First, individuals need to create a portfolio with evidence of their knowledge and skills (these can include education or diploma certificates, references from employers, or records of appraisal). Once, a portfolio is prepared, it is then reviewed by the APL provider who might ask for more details or carry out additional testing. If it is approved, then the results are written up in a Certificate.

If a person is on an unemployment benefit, the Certificate can also be arranged through the public employment service (PES). The person can discuss with the PES case worker to participate in a test to see whether the person qualifies for it. If that is the case, then the PES makes the necessary arrangements. In all other cases, the Certificate can be obtained through an APL provider.

The costs of the Certificate vary between APL providers and depend on the size of the portfolio (from 1,000 to 1,500 EUR). If an individual is unsure about the usefulness of the Certificate (also in view of the relatively high costs), an interview with the APL provider can be arranged to discuss if it is potentially useful for the person in question. However, there are also opportunities to get reimbursed by a number of training and education funds. Employers, in particular SMEs, can receive funding from sectoral training funds (Duvekot, 2014). In addition, part of the employer costs are tax-deductible. For people who are on unemployment benefit or are at risk of losing their job, the PES can cover part of the costs. Alternatively, individuals can pay for it themselves. The amount can be deducted from tax as training costs up until 500 EUR.

The government now focuses on the quality aspect of the Certificate. The next step is an agreement with social partners to increase the accessibility and use of the instrument. The focus will be on using the Certificate as a formalised instrument for validation of learning outcomes linked not only to national qualifications but also to sector standards (sector level training) (Duvekot, 2014; OECD, 2014).

An overall evaluation of the APL system was carried out in the last years by the Dutch Knowledge Centre to help assess where further improvements are needed. A 2009 evaluation highlighted, for instance, the issue that the procedure on which basis organisations can inspect the providers of the Experience Certificate needs to be better regulated. Furthermore, it was mentioned that Certificates were not easily transferable between the providers. The State Secretary of Education, Culture and Science therefore took control of quality assurance of the process. Now, every procedure related to the validation of prior learning ends with a standardised Certificate of Experience. The Certificate states that the person has documented his or her competencies and skills (Duvekot, 2014).

### **Best practice example 8: Transferability**

Due to the specificities of the APL system and the institutional context in which it was developed, the instrument may not be directly transferable to other national contexts. This concerns in particular the important role of social partners regarding training and education issues and the pertinence of sectoral agreements in the Netherlands. Starting with introducing such an instrument at a smaller scale i.e. focusing on a specific industry or sector could be a way to overcome this challenge. For countries with a similar institutional set-up, the case of the Experience Certificate shows that the involvement (possibly already at the beginning) of the different partners including the government, the social partners, and potential certificate providers is a critical success factor. Establishing a central agency that provides the overall management, coordination, and dissemination at the national level is also important. In the Netherlands, the Dutch Knowledge Centre is also responsible for ensuring the quality of the Certificate through the quality code it has developed and also plays an important role in disseminating information about the Certificate. The increase in the use of the Certificate over

the years has been linked to successful information and media campaigns, for instance. Finally, the variety and mix of financial instruments that are available for employers in the form of sectoral training and education funds, public subsidies, and the possibility for tax deduction should be also highlighted as a main driver for the initiative to succeed.

### **Best practice example 8: Innovation**

Employees acquire new competences and skills during their career as a result of their work tasks or job-related training. These skills, however, are often not sufficiently assessed or measured. This could be a particular disadvantage for older individuals, whose initial qualifications may be outdated. Validation is therefore necessary to be able to recognise those skills adequately, and to render them transparent to potential employers (OECD, 2014). Expanding the use of such instruments as the Experience Certificate in job search and recruitment can increase older workers' willingness to invest in training and skills development over the life course, since the validation could increase the likelihood of getting some return for their efforts in terms of career and employment security (OECD 2014).

The Certificate introduced in the Netherlands provides a broader set of information about the employees' skills and competencies by also recognising experience gained through non-formal and informal learning. A great benefit for employers is that it helps them to link the employee's set of skills and their potential for learning with the competences required in the job. For employees and job-seekers, the instrument allows to improve their employability in the current job, but also in the job market in general.

### **Best practice example 9: Femeval, Spain**

The Femeval (Federacion Metalurgica Valenciana) is the employers association of the metal-mechanic sector in Valencian Community in Spain. Femeval, the Valencia Employer's Federation of the Metal Sector is a NPO organization that represents the companies of the metal mechanic sector of Valencia. Nowadays, more than 4,000 companies make up Femeval, most of them SMEs, belonging to the metal industry, trade and service sectors. The metal sector represents 12.9% of the GDP and employs about 220,000 people in the Valencia Region. Femeval provides advice to associated firms in difference areas: human resources, institutional representation, taxes, legal advice, training, innovation and technology, health and safety, and other services for SMEs. Valencia's metal sector represents one of the most important resources for the region.

Femeval covers various issues. For the sake of clarity all Femeval measures are depicted here (too short to be depicted separately in other chapters). The Femeval report is located here since, as primraily the subchapter 'Transferability' shows, tutoring, training and education are important aspects.

### **Best practice example 9: Description**

The metal-mechanic sector in the Valencia region is facing important challenges, in relation to important socio-demographic changes that affect the long-term sustainability of businesses in the sector. In Valencia's metal industry workers above the age of 55 represent around 11% of the workforce and this is likely to increase. Workers over 45 represent around a third. Having an aging workforce requires for older workers to be motivated and trained in the use of new technology and managerial methods. In anticipation of these challenges, an initiative for an improved “age management” strategy in the metal-mechanic sector was led by the Femeval. Age management is not only necessary to protect older workers but it is an integral part of the adaptation of Europe's metal industry to the global economy; changes on attitudes on the adaptability and potential of older workers are needed.

This initiative consisted of a number of basic pillars:

1. Promotion of “age management” concepts in the companies of the sector, usually small firms that rely on an “old-fashioned” management style. It is widely recognised the lack of familiarity with the concept of “age management”.
2. Application of a renewed human resource strategy where “age of worker” becomes a fundamental variable.
3. Introduction of a “self-assessment” software tool for better “age management”.
4. Introduction of the “mentoring” figure in the organisations.
5. Design of effective mechanisms to facilitate the inter-generational knowledge transfer; Provide with the necessary training activities to facilitate this process.
6. Re-assess the managerial/supervisory roles currently held by older workers. Improve the functioning of teams, communication and motivation.
7. Apply specific recruitment practices of workers tailored to workers of over 45 years old.
8. Recruitment of trainees and planning of a “handover period” in anticipation of retirement of older workers; effective use of “hand-over” contracts.

### **Best practice example 9: Implementation**

The main objective of this initiative was to promote the presence and contribution of older workers in small and medium firms the metal-mechanic sector of the Valencia region. The practical implementation of this project was carried out in close collaboration with *Equipo Humano*, a consultancy specialised in human resource management. The participant firms underwent a series of changes in their human resource strategies designed to achieve a better age management in the organisations. Several companies of the sector participated in this initiative.

The main aims of this initiative was on one hand, to improve the adaptability of the jobs and working conditions so that they are better suited to older workers; on the other hand, to improve skills, knowledge and motivation, and therefore the employability of the workers

themselves. A key objective was also to increase awareness amongst relevant agents (such as businesses, workers, public administration, and other relevant stakeholders<sup>3</sup>) of the need to introduce better age management practices in firms of the sector.

Femeval was the coordinator of the initiative. Other international partners that participated in this project were:

Ile (France): Euro Industries Programmes EIP

Unión des Industries et Métiers de la Métallurgie UIIM

Piamonte region (Italy):

Associazione Industriali Metallurgici Meccanici Affini AMMA

Centro Valorizzazione Risorse Umane SKILLAB

This initiative was financed by the Fondo Social Europeo (art.6), and its implementation lasted for two years.

### **Best Practice Example 9: Transferability**

Some of the main lessons that can be learnt from this study are: the need for a change in attitudes and culture in the organisations, the benefits of life-long learning, and the need to capitalise on the experience and knowledge of older workers both in relation to new recruitment and retention; in order to do that is essential to invest in ergonomics, that can be used to improve the adaptability of workplaces and tasks.

One of the key findings is the beneficial effects of implementing a "tutoring" system; this exploits the expertise acquired by older workers and improves the gradual intergenerational transfer in the firm reduces the training periods for younger workers.

Being a "tutor" also has beneficial effects for the older workers, increasing the motivation for older workers themselves. Senior workers acquire more responsibilities within the firms, feeling valued by the organisation. The mentoring system increases efficiency throughout a continuous process of training and learning and it has been proven to have immediate effects.

Older workers increased their demand of training and education after participating in the tutoring exercise. Recognising this, Femeval offered a higher number of training courses for older workers. Moreover for workers in managerial positions training was provided on "Age management", "Retaining talent in the organisations", or "How to face retirement".

An important issue that has arisen in this investigation is the problematic application of age management tools in period of economic hardship. Transferability and wider applicability of these initiatives has been largely hampered by the events following the financial and economic

---

<sup>3</sup> Other Spanish organisations that contributed to this project were: -SERVEF: Valencian Public Agency for employment and training. -C.C.O.O. (Comisiones Obreras) and UGT: Spanish unions.

recession that has severely affected the Spanish economy. Many firms have opted for human resources practices based on reduction of costs and wages, and have ignored long-term considerations. This has been particularly the case for small and micro-firms. Lack of resources and investment has considerably hampered the ability to continue the application of innovative and good practices.

One of the key findings of this project was the realisation that firms (in particular smaller firms) do not consider “age management” as an essential human resource practice; this highlights the importance of increasing awareness and education at all levels of the business climate and society in general. At the company level it is essential to involve the management team to provide a more reliable sense of strategic direction and leadership. One of the difficulties in implementing any change continues to be the “resilience to change” factor of many of the employees.

### **Best Practice Example 9: Innovation**

One of the main most innovative measures consisted in the application of a specifically-designed software tool that helped companies in the process of:

- Obtaining an individual assessment of the situation of older workers in this firm (answering a questionnaire of 20 minutes).
- Obtaining a brief report containing measures to improve the age management in the companies, given the specific needs of the company and current workforce composition.

The main difficulty of this approach is to obtain reliable and objective indicators for different groups of workers in relation to: motivation, commitment, performance and loyalty to the job and firm. As a consequence one needed to be careful in drawing too firm conclusion and establishing plans derived from the results of the “self-assessment” tool alone.

The results of the “self-assessment” tool need to be interpreted in the wider context of the company. The human resource strategy needs to be based on a more thorough analysis of the company, its mission, values and long-term objectives. Aside from social responsibility considerations, age management changes should also target efficiency, productivity and competitiveness outcomes.

### **Best practice example 10: ServiceTeam Nyborg, Denmark**

A full description of this case is available under the heading health.

#### **Best practice example 10: Description**

This example consists of two parts. The first was part of the project ‘A full working life’, which was aimed at increasing retention of older workers, and consisted – among other things – of yearly individual evaluation conversation where one of the messages given to older workers (aged 55+) was that the company would continue to invest in their employees regardless of age.

The second part illustrates a follow through on this promise. Since March 2015 the company has piloted the use of smart phones for their cleaning assistants. Following the pilot phase, the project is being rolled out in full from November 2015. Because not all personal is knowledgeable about how to use a smart phone ServiceTeam Nyborg has, prior to the roll-out of the project, initiated a screening process to assess the basic general skill level among employees via an adult education center (AMU in Danish). Those with the need for a skills upgrade are offered a training course. This is done in order to ensure everyone is ready for the introduction of smart phones. Senior management is firmly committed to see every employee through this process. Whether they will succeed in this can only be judged at a later stage.

#### **Best practice example 10: Implementation**

Prior to the 'A full working life' project (backed by the consultancy firm Cabi, see above) the company lacked systematic communication with older workers. The project saw through implementation of procedures so that all employees reaching the age of 55 (the age limit is a general policy from the Municipality) have a "senior" element in their yearly evaluations with the team leader. Here the focus is on the employee's expectation to her career for the coming years, but it is now emphasized from the team leader that age is no barrier to staying in the job and that necessary training will be provided. It is also discussed if changes are necessary e.g. regarding working time.

Two of the interviewed employees said that they no longer saw age as a factor were not afraid of losing their jobs due to being older. One interviewee said she had previously been afraid that age would be a factor when municipality cleaning was reorganised in 2008 (and ServiceTeam was founded), but that this was no longer the case. An evaluation made by Cabi (Cabi, 2013) showed that the message to employees had somewhat come across, with an increase in employees that knew about the senior policy and at what age there would be A "senior" element in the evaluation. However, the number of employees above 50 that mentioned continuous learning as something the company offered older workers did not go up during the project.

The smart phone project is being implemented now. All employees will get a smart phone for better communication and for easier access to information (about how to handle cleaning products, protective measures etc.). Improved communication will primarily ease the administrative burden on managers, but will also make it easier and faster for cleaners to order deliveries of cleaning products and report deviations from their normal schedule (i.e. if surfaces are not cleared and cannot be cleaned). The project is financed by lower future administrative costs (ServiceTeam, 2015b).

### **Best practice example 10: Transferability**

Transferability of the smart phone project is difficult because it relies on other structures in place, notably the adult education provision (in Danish 'Arbejdsmarkedsuddannelseskurser (AMU)') (see also the description under the Health section). However, it is noteworthy that apart from the adult education provision part, the project does not rely on additional public money from a longer term perspective.

The focus on human resource management of older workers can be copied everywhere, but as revealed in interviews for it to have significant impact a level of trust and openness have to be built between employees and management. It was mentioned that the message of the fact that age will not be held against you and that it is okay to ask for a reduction in hours *if you need it*, have to be repeated again and again. Part of this could be because of the constant pressure for improved effectiveness and savings in general for municipalities.

Related to this last point: one of the things that senior management said they had benefitted the most from was the network of managers, which had been built as part of 'A full working

life' project. The opportunity to discuss with other managers on how to best fostering a culture of openness and well-being in the work place was much appreciated and was mentioned as one of the most important initiative, which can be supported by public policy.

### **Best practice example 10: Innovation**

The main innovation lies in the second part described above, the smart phone project. It is an ambitious push to make such a significant skill upgrade in a low-skilled occupation. It is too early to say if the stated ambition to pull everyone through this transition will succeed.

For the first part on human resource policies for older workers within the 'A full working life' project, there is one particularly interesting lesson regarding the commitment to life-long learning. For the message to be successful in an enviroment in which ServiceTeam Nyborg operates, with many low-skilled employees and distance work without day to day contact among employee and management, there has to be a constant focus on building trust and communicate clearly. The evaluation of 'A full working life' showed that ServiceTeam Nyborg has not yet succesfully managed to get this message across.

### **Best practice example 11: Cevora (Belgium)**

Cevora is a no-profit organisation founded in Brussels in 1990 to promote training programmes and employment opportunities. Cevora is governed by a general council (joint committee) and a board of directors. Both bodies have a bipartite and joint nature and they are equally composed by representatives of employees and employers organisations.

CEVORA is financed by an annual fee payed by around 55,000 Belgian companies part of the Auxiliary Joint Committee for Employees (*Commission Paritaire Auxiliaire pour Employés*).

### **Best practice example 11: Description**

Cevora's managing director is in charge of a team of experts active in labour market issues and specialists in training programme. Their role is the conception and coordination of training projects for enterprises, jobseekers and employees.

Cevora does not provide training itself, but functions as an administrator, relying on public and /or private subcontractors to carry out the actual training projects.

In this context, Cevora's goals are:

- Promote and enhance a culture of training within companies, especially SMEs
- Boost the impact of learning
- Create opportunities for the unemployed, focusing on at-risk groups
- Provide attractive learning opportunities for young job seekers

- Support and promote the employability of older workers and job seekers
- Stimulate innovation through training
- Provide extensive and targeted information about the courses offered
- Gain knowledge about the labor market and developments in the sector
- Constantly look for alternatives and new ways of conceiving the learning process

The training for job seekers are held in partnership with public employment agencies (VDAB, Forem, Bruxelles Formation). Some courses are also held in partnership with Syntra, the Social Promotion Education (*Enseignement de promotion social*), skills centers, VDAB and some sectoral training centers .

The training offer of CEVORA consists mainly of short courses of one to two days. Most of these courses are held in the classroom but more and more programmes are also available via distance learning (e-learning, mobile learning via tablet or smartphone) or combining the two types learning ( blended learning). The courses provide technical as well as soft skills training.

### **Best practice example 11: Implementation**

In the last years Cevora developed specific initiatives targeted to older employees. The attention Cevora devoted to this group is not new. According to a survey conducted by CEVORA, employees were willing to work longer, if they would have had enough training and career prospectives (Cevora, 2014).

Already in 2011 Cevora 's social partners realised that was necessary to take actions with regard to the raising of the retirement age<sup>4</sup>. In the 2014 report, Cevora highlights that older job seekers face specific barriers:

- General prejudices against the category (e.g they would be reluctant to new changes and challenges, they would be costly, they would lack motivation)
- They are often object of dismissal, which harms the image they have of themselves and their confidence.
- They are not used to think about their strengths and training needs
- They have a limited view of jobs and employers that would benefit of their profiles.

In this regard, the following initiatives have been implemented by Cevora:

- The payment of training premiums to companies for training courses attended by workers 45 years and over (in 2015, this age limit is raised to 50 years).
- The introduction of flexible aid terms for reimbursement of registration fees for employees aged 45 or over

---

<sup>4</sup> In 2012 The Di Rupo government extended the retirement age to 65.

- The development of a specific training offer that meets the needs of 45 and over
- The establishment of a skills assessment (screening)
- Support to job outplacement.

Within the specific actions developed for older employees, CEVORA launched the project 50+ training tips (*conseils en formation 50+*). With this action, Cevora offers training opportunities to more experienced workers and thus supports them in enhancing their career perspectives. The 50+ training tips is a process of career management where the worker has the opportunity to explore, his personal training needs, in collaboration with a Cevora consultant. This exercise allows the worker to be guided towards the Cevora training offer.

Employees are free to join the initiative and can subscribe without the previous knowledge of the employer, alternatively employers can also contact Cevora to provide this service for their employees. The place and date of the interview are at the discretion of the individuals concerned: within the company or elsewhere, during or outside working hours .

No additional costs are charged on the employer, on the contrary, Cevora provides financial incentives. Participation in this coaching service entitles to:

- a premium of 40 euros per year for 50+ employees
- a premium of 40 euros per day of training for the employer

In 2014, more than 50,000 employees have been part of the 50+ training tips. All of them are white collar workers. All the participants have at least a secondary level of education. The majority of participants were between 51-56 years old. Only very few subscribe after the age of 60.

### **Best practice example 11: Transferability**

The measures requires funding, which is provided by companies in this case (although employees' organisations are represented in Cevora leadership).

### **Best practice example 12: Experience@Work, Belgium**

Experience@work is a non-commercial platform for talent sharing, through which companies and organisations can exchange experienced employees on a temporary or permanent basis.

Through co-sourcing between partner organisations, older employees have the opportunity to use their skills in a new environment, which motivates them to stay in the workforce.

### **Best practice example 12: Description**

Experience@work has the scope of encouraging greater labour market participation at an older age and offering companies in need of experienced employees the possibility of hiring them without bearing high employment costs. For these reasons, Experience@Work can be regarded as a corporate social responsibility initiative.

The platform is managed by the Belgian consultancy HazelHeartwood. The project was facilitated by Business & Society, the business network for corporate social responsibility, and the VDAB, the professional training and employment office for Flanders. HazelHeartwood started the project about two years ago by founding an ad-hoc legal entity together with two banks, AXA and KBC, and one telecommunication company, Proximus. The managing body of Experience@Work is the board of directors, composed by HR representatives of AXA, KBC and Proximus.

Experience@Work is based on a payback system. A service agreement is signed between the two companies exchanging employees. The receiving company is asked to pay a fee for the service the employee is providing that corresponds to the 70% of his salary cost. The sending company only has to pay the remaining 30%. To set-up the service agreement, Experience@Work charges the companies 10% of the value of the assignment. In addition, 5000 euros are charged for the first two service assignments signed. There is no membership fee.

Experience@Work was launched in April, 2015 and currently still is in the start-up phase. In the first six months after its launch, most efforts were devoted to search for interested organisations, set up the website and create the platform. Since the beginning of October 2015, the organisation started to look for offers (i.e. jobs) more actively. At this moment, only five sending companies are involved in the project and about 20 offers were collected. The companies that have engaged so far have similar business profiles. Because the project is in the start-up phase, there is no impact evaluation available yet. In fact, not all of the founding firms have already introduced the program to their staff. Of the employees that have made transferred to another firm, some are very positive about their experience. In a number of other cases, employees have terminated their contracts early. No contracts were terminated by the receiving firms.

### **Best practice example 12: Implementation**

The employees of the companies that are members of Experience@Work can consult the jobs advertised on the platform. Once there is an offer that matches the interest and the profile of an employee, a service agreement is signed between the “receiving” and the “sending”

company. Experience@Work introduces an innovative and smart way of keeping older employees at work and of preventing the destruction of talent and experience. In principle, it is a win-win situation from both the employee and the employer perspective:

- **Employees** can experience a different working environment in which they can apply their skills without having to leave or lose the link with their company. This can encourage them to work longer. A key advantage of Experience@Work is that employees can take up a completely different position in another sector without risking to lose what they have built up (e.g. their wage, benefits). Depending on the offer and the agreement concluded, employees can switch to a position that is less demanding in terms of working times, physical tasks, commercial targets to be achieved, and so on. Until now, employees seem especially interested in positions in the social profit and non-profit sectors. If needed, some additional training can be offered by the receiving company. Participation in the Experience@Work program is voluntary.
- The **employer** or sending company can recuperate part of the employee's salary cost (the employee is still on the payroll of the company but the employer can recuperate a large part of this cost from the hosting company). Especially in large organisations with a large staff, Experience@Work could be a way to reduce costs.
- The **hosting company** can benefit from employing an experienced worker at lower price. In the Experience@Work program, hosting firms typically are small- or medium-sized companies active in the non-profit sector. For such organisations, it often is difficult to hire experienced staff, because they cannot offer the advantages and wages that larger organisations offer.

### **Best practice example 12: Transferability**

The Experience@Work platform can easily be extended to other countries and sectors. In fact, the organisation is currently focussed on expanding the platform. The objective is to engage more companies, in different sectors and with different profiles, and to raise the number and diversity of the offers. This would allow workers in physically difficult jobs to use Experience@Work to find less demanding positions in other companies or sectors in the future. Several organisations have shown interest in the program (e.g. a company in the food industry), which could imply that the platform is likely to grow in the future. Moreover, Experience@Work could be introduced as a tool in the Belgian government's plan on "workable work" in the future (the organisation has been invited for consultations by the department of labour, and will also meet with the national trade unions to discuss the platform).

### **Best practice example 12: Innovation**

Experience@Work clearly is an innovative concept that has some important advantages for the organisations and employees involved and for society. The platform is an interesting device to overcome the costs associated with firing older workers that have become

redundant in an organisation. For the workers involved, the platform limits the difficulties that they would face in finding a new position after being made redundant.

In large organisations that have a lot of staff, it is often difficult to reduce the number of workers. Especially when older workers are concerned, firms would have to pay high severance pay. For these companies, Experience@Work offers an easy way to reduce their personnel costs, without having to fire staff. For the receiving companies, the platform could work well because it enables them to hire experienced workers at a lower cost. The receiving companies often are smaller firms in the social or non-profit sector that have difficulties in recruiting experienced staff. For the employees involved, Experience@Work ensures them of a position in another company. In this way, they do not have to look for a new job at a later age, which proves to be very difficult as many studies have shown. Moreover, it offers them the opportunity to take up a new position in a new sector without having to risk everything they have built up. This is an important point, as it is one of the reasons why older workers often are scared to switch to another position, even if they would be interested to do so. To society, Experience@Work brings the advantage of lower costs as well: no unemployment benefits, no costs associated with severance pay, ...

For Belgium, to the best of our knowledge, we could not find any initiatives that are similar to Experience@Work. Nevertheless, one could argue that a comparable system does exist in the public sector, where employees are exchanged between administrations or departments to perform specific services or tasks. However, one of the interviewees pointed out that such exchanges often are temporary and have different legal implications for all parties involved. In other countries, similar initiatives do exist but these are not necessarily limited to older workers (as is the case for Experience@Work). Some examples are the Swedish *Karlskrona Employer Ring* (a joint venture of seven firms, it supports the retraining and redeploying of employees who need work rehabilitation or have been made redundant), the French *Alliance Emploi* (an association of about 400 employers, allowing companies to share their staff) and the Dutch *WeShareTalent* (a platform that connects organisations with workers). The Belgian example thus clearly is an innovative initiative.

## 4 Work after retirement age

### Best practice example 1: Confindustria Veneto SIAV S.P.A., Italy

Confindustria Veneto SIAV Ltd is the Service Agency created in the Veneto region by the provincial and regional branches of Confindustria, the Italian main employers' confederation. It was founded in 1982 and is owned by Confindustria Veneto. It is located in Venice-Mestre and its staff of around 30 people promotes the organisational development of regional enterprises, mainly small-sized, in the transition from a family business organisation to an industrial one.

Confindustria Veneto SIAV offers an integrated system of services and consultations including training, quality, environment and innovation. Confindustria Veneto SIAV is operatively structured in five specific areas:

- Associations (planning and implementation of training projects),
- Enterprises (assistance in consulting projects),
- Innovative Projects (the real R&D division, laboratory of training and consulting service)
- Events (management of Campiello Literary Prize and Meetings of Young Entrepreneurs)
- Administration (of the whole structure).

It is part of the Confindustria Veneto network, consisting of more than 12,000 enterprises with over 350,000 employees in total. Itself, it has promoted and coordinated a large number of projects and worked in the field of: competencies, internationalisation, cross-culture, company growth, and lately developed activities about innovation and industrial change. More than 700 companies participated to the research and development activities promoted by Confindustria Veneto SIAV, involving, among others, vocational training for older workers, unemployed people, employees, managers and entrepreneurs.

It operates in a territory including 5 million inhabitants whose economic structure is characterised by a very strong presence of small and medium-sized enterprises (i.e. 95% of the total number of enterprises, that is more than 550,000) operating in traditional sectors but also in innovative technological ones.

### Best practice example 1: Description

Confindustria Veneto SIAV is directly and indirectly involved in other projects regarding the support of work after retirement (i.e. of retired people who join the labour market again, even if often this in a flexible and non-permanent way).

For example, the current Confindustria Veneto SIAV's managing director is, since 2001, also the director of the "Politecnico Calzaturiero" (<http://www.politecnicocalzaturiero.it/>), a school of crafts in the shoe industry, which was created in 1928 and is located in the shoe

district “Riviera del Brenta”. There, a fifth of the teaching activity relies on specialised retired workers (paid for teaching) who transfer thus their knowledge to pupils. The choice to involve retired workers was dictated by the fact that they possess competencies, abilities and knowledge that are still valued and necessary in the productive process. This model is particularly appreciated and provides a high return on investment since local companies are willing to send their employees there, and to pay fees, to train and deepen their knowledge for the benefit of both firms and workers themselves.

The Politecnico relied to older workers also in activities of “industrial tourism”. CEOs of enterprises, agencies of vocational training, service agencies or any private or public bodies are often interested in visiting the “Politecnico Calzaturiero” facilities in order to learn more about it. The visit includes a demonstration of the abilities required to work in the shoes sector. This demonstration takes the form of the production of a final product, the shoe, in a quarter of hour in front of the eyes of the “tourists”, by retired workers, and it is followed by a discussion with them. When retired workers show their crafts and tell something about their personal history, visitors remains impressed in their hearts and minds, according to the director.

Work after retirement also means filming older former workers’ direct work and sharing it with the younger generations of workers. This was done at the Politecnico but also in companies within Confindustria Veneto SIAV’s direct in-firms interventions.

Confindustria Veneto SIAV promoted also work after retirement in other cases and firms as a result of age management strategy.

### **Best practice example 1: Implementation**

In an ageing society, the main concern of Confindustria Veneto SIAV was to safeguard knowledge and competencies belonging to older workers that run the risk of remaining unknown to the younger generations of workers, thus causing irreparable damage to companies. In this view, it became necessary to implement active initiatives to exploit older workers’ competencies and experiences, and to support the development of models of age management within companies.

Implementation of all Confindustria Veneto SIAV measures:

The driving forces are undoubtedly employees of Confindustria Veneto SIAV. For example, both interviewees, the managing director and the head of the knowledge and innovation department, are focusing on long-term development approaches and have developed visions about the supporting services that allows extending the working lives and the role of older

workers inside and outside the firms. In doing that, the managing director brings in also his experience as director of the school of crafts “Politecnico Calzaturiero”.

European and regional funding have supported most of the experience on age management allowing Confindustria Veneto SIAV to think about extending working lives through European networking and exchange of best practices. Confindustria Veneto SIAV has also received support from local or regional stakeholders of the labour market that were willing to participate in focus groups organised by Confindustria Veneto SIAV about the ageing workforce. Moreover, universities and research centres are very much involved in some of the initiatives favouring the intergenerational cooperation.

As for political incentives, Confindustria Veneto SIAV have not used any of them. However, in order to address the issue of older workers inside the firms, the managing director believes that an appropriate industrial policy should sustain the SMEs by providing them with easy and simple means to support the ageing workforce into their organisations. First, in order to help companies to keep older workers in the labour market, financial incentives should be quickly and easily available. For example, it would be welcomed that an employer could benefit from tax reductions once the worker reaches a certain age. Complicated grants and excessive bureaucracy are to be avoided, according to Confindustria Veneto SIAV’s managing director, considered much less effective since the administrative procedure to obtain them are usually time-consuming procedures that are not worth it. However, it is the whole retribution system (currently: the longer the tenure, the higher the wage) that is to be revised according to him, since companies may have difficulties to keep in the company older workers that are expressing difficulties to keep pace in case of high productivity or technological changes, regardless of the investment made in vocational training.

Second, interviewees highlighted that the extension of working lives could benefit from a structured systemic response by means of public policies at the national and the regional level that would overcome the current fragmentation of several small projects and best practices. Moreover, it would be useful that meso level organisations (like for example Confindustria Veneto SIAV) help SMEs to support their competitiveness. Indeed, SMEs, because of their limited size and resources, can seldom afford the costs of a systematic investment in knowledge and human capital to overcome the possible loss of productivity of their older workers. In this context, relevant stakeholders for the enhancement of the older workforce should be identified, who could focus on a set of strategic priorities, such as innovation. These policies would secure a return on investment, interviewees assumed, certainly higher than the one stemming from current European projects.

## **Best practice example 1: Transferability**

Transferability of all Confindustria Veneto SIAV measures:

All the in-firm interventions stemming from the projects are doubtlessly transferable to other businesses in other contexts. Confindustria Veneto SIAV has developed a method that is easy to follow and flexible enough so as to adapt to different economic sectors. It is, however, more tailored to SMEs than big companies.

The implementation within the companies of this method implies to sustain costs. In absence of external financing, other services providers or companies themselves may not afford the necessary economic means to implement such good practices. Contrastingly, Confindustria Veneto SIAV has its own resources and above all has participated in several projects at the regional or the European level.

Confindustria Veneto SIAV's systemic vision on favouring innovation in firms is furthermore only possible if the territory, where it is supposed to be implemented, possesses a culture of cooperation between stakeholders, or at least between research and applied research, and is capable of absorbing this knowledge.

The participation in fragmented projects which depend on external funding may render difficult the sustainability of the vision and the strategy for two reasons. Projects may not always exactly follow SIAV's vision (external calls may have constraints) and they may not be approved. That is why the Confindustria Veneto SIAV is asking for a systemic response in order to avoid this fragmentation and to have a systemic and systematic response to the need of the companies in the perspective of longer working lives.

## **Best practice example 1: Innovation**

In order to exploit older workers' competencies and experiences, Confindustria Veneto SIAV developed various innovative age management methodological tools in the past decade, in collaboration with European partners. Such tools, aimed at minimising the risks linked to the ageing of the workforce and at transforming the situation into an advantage instead, allowed for the first time to transform a "theoretical issue" into a "concrete issue" with the help of tools that can directly be implemented in companies and can lead to the creation of new organizational models. For instance, tools such as the "Age pyramid" (i.e. the company's population pyramid) and the "Risk Age Management" (i.e. the risk management linked to the age composition of the workforce) enable and help the companies (particularly small-sized) to analyse the situation of their employees in relation to their age and to highlight the dangers for the organisation linked to the possible retirement of older workers and the subsequent possible loss of knowledge and competence for the firms. After this first step of analysis, the

companies can choose among and combine different other tools such as coaching, intergenerational learning groups, action learning, storytelling, videos and other cooperation methodologies. In these initiatives older workers about to retire or already retired are involved, to allow knowledge transfer and blended training, securing thus that the knowledge accumulated by the older workers still remains in the company.

### **Best practice example 2: Wojewódzki Ośrodek Ruchu Drogowego (WORD), Poland**

WORD provides possibilities for older people who already went on retirement: young retirees sometimes do not want to cease all professional activity, either because they need some regular everyday life, or contact with other people, or because they need to feel useful, or also because they need to complement their retirement benefits with a salary. This is the reason WORD enable its employees who reached retirement age to stay at their post and work part time. To do so, the company provides specific employment contracts enabling older people to combine their retirement benefits with a salary.

#### **Best practice example 2: Description**

Among the measures and policies undertaken by WORD Olsztyn, there is the possibility for retirees to still work at the company part-time while still receiving their retirement benefits.

#### **Best practice example 2: Implementation**

The driving forces of the elderly-friendly policy initiatives reside in both the employees' engagement and the HR strategy, committed to hire older people and offer good working conditions for the elderly.

#### **Best practice example 2: Transferability**

The measures consisting in the possibility of combining retirement benefits with a salary (through part-time or full-time work) has noticeable success, and therefore is transferable on the condition that the contract signed between the employer and the elderly worker is in adequacy with the national Labour Code.

#### **Best practice example 2: Innovation**

The initiative is quite innovative as it enables elderly workers to extend their working lives. The choice given to older employees in age of retirement of keeping their job while having the status of retiree is very advantageous and should be considered as an innovative best practice.

## **Best practice example 3: Sozial-Holding der Stadt Mönchengladbach GmbH, Germany**

### **Best practice example 3: Description**

When an older employee is in transition to retirement the CEO of the Sozial-Holding offers to talk with him or her about the coming phase of life and if there are possibilities of staying employed with a mini-job. During the talk the CEO recognises the achievements and offers the company's support if needed. The interview is optional but most employees like to take advantage and feel appreciated by it. The job opportunity can be in a different field or with different tasks than in the current job and is accepted by half up to two thirds of the staff. They are opting to continue working for financial reasons but also because they like working or because they want to contribute to knowledge transfer.

### **Best practice example 3: Implementation**

See description.

### **Best practice example 3: Transferability**

The measure is basically transferable to all companies/organisations intending to keep some of their employees for some of their weekly working hours after these employees' retirement. One precondition to imitate this measure in the manner of Sozial-Holding is that part-time jobs are available resp. the company/organisation is in favour of part-time work. The high share of (former) employees agreeing to work after retirement for some hours per week shows that the measure is successful, yet obviously the CEO (could also be the HR manager in other companies/organisations) needs some time to talk to every employee before the concerning employee's retirement.

### **Best practice example 3: Innovation**

The measure is simple and effective. The idea that at a certain point employees get the chance to talk to company/organisation leaders whom they otherwise do not communicate with (or not even see) is put into practice in other companies/organisation too. For example, once every year the German company Hansgrohe invites as employees who become 50 years old in the last 12 months to talk to company leaders ('Welcome meeting', see <http://mopact.group.shef.ac.uk/wp-content/uploads/2015/08/D3.2-Extending-working-lives-Best-Practice.pdf> page 141 ch. 3.2).

## **Best practice example 4: Elis Electric, Lithuania**

The case study covers 3 companies that are operating as consortium and are managed by the family members:

- Joint stock company “Elis Electric” (CEO Oleksandr Laneckij)
- Joint stock company “Elektroimpulsas” (CEO Viktor Laneckij)
- Joint stock company “Elis Capital (CEO Viktor Laneckij).

The companies operate in the field of building services, specifically in the area of electro installation works.

The company group resides in Vilnius. The services of electric designing and electrical installation are delivered across Lithuania and abroad (Belarus, Ukraine). The company group is one of the leading in the market. The examples of the projects performed by the “Elis” companies group are presented on the company’s webpage <http://www.elektroimpulsas.lt/>.

Among the total number of 13 employees 7 have reached the official retirement age (indeed, there are 3 micro companies, though they do one business, so essentially “Elis” group can be considered as small company ). The highest share of retirement-age employees is working in the company “Elektroimpulsas”. The director himself, the head of the unit, the foreman, the technical designer and 4 operatives are over official age of retirement (in 2015 the official retirement age for men in Lithuania is 63 years and 2 months).

#### **Best practice example 4: Description**

In order to retain skilled and experienced workers, employment opportunities are offered to the workers beyond official retirement age. Employment opportunities are enabling them to fully use their professional potential and, at the same time, reconcile their family and work obligations, and to perform tasks that meet their health condition. For example, experienced older electricians are offered to perform only a part of the task that requires high-level qualification, preciseness and proficiency, whereas tasks related to heavy physical loads, endurance or climbing (e.g. lifting heavy loads, working at height, etc.) are delegated to younger workers who are less experienced but physically stronger. The retired ex-employees, at their request, are invited to do one-off jobs requiring specific skills under fixed-term employment contracts. The workers of the company are provided by vocational/safety at work training if needed.

#### **Best practice example 4: Implementation**

The existing staff management model of the company group where half of employees have reached the official age of retirement derives from the personal initiative of Victor Laneckij (the founder of the business). The majority of the old-age employees are the former colleagues.

As CEO of “Elis Electric”, Oleksandr Laneckij mentioned during the interview, the older workers are more experienced, they are more responsible in the sphere of accident prevention, and they keep a more serious approach towards the work tasks. Also, they already have all or most of the required qualification proof documents (certificates, references). All these qualities are proven during the long period of work.

#### **Best practice example 4: Transferability**

One of the main barriers mentioned during the interviews was a specific work limit. The older workers usually are not able to perform such physically demanding tasks as drugging, digging, etc. Working under unfavourable weather conditions like strong heat or frost is also reducing the motivation of older workers to work. In contrast, the young workers are willing to take the hard part of work in order to gain professional experience.

Since initiative is based on the personal engagement of the founder and owner of the business and the employees (his former colleagues), the experience from “Elis” companies group could be transferred to businesses with the same staff management strategies (small enterprise, the same age of employer and employees, utilisation of the network of former colleagues during recruitment). The aspects of the labour demand and the seasonality of the works in construction sector should be also considered important factors of sustainability of the initiative within other sectors.

#### **Best practice example 4: Innovation**

Work after retirement is rather uncommon in this sector. Further, this happens in a country where the state of health of the older population is below European average: e.g. the Active Ageing Index 2014 shows that in the variable ‘share of healthy life expectancy at age 55’ Estonia ranks second to last amongst 28 European countries (last: Slovakia, data: European Health and Life Expectancy Information System (EHLEIS)). Amongst men, Estonia ranks last.

#### **Best practice example 5: ServiceTeam Nyborg, Denmark**

The project “A full working life” (initiated by Cabi, cf. description above) had as its main purpose to find tools to extend the working lives of low-skilled workers. As part of the project ServiceTeam Nyborg implemented and communicated its focus on:

Yearly evaluation conversation with team leader includes a ‘senior’ element for older workers (55+). Here expectation to future career should be discussed. Management should emphasize that older workers are appreciated in the work place, generally encouraged to keep working, and that older workers are equally entitled to further adult education.

Other elements were an increased focus on health and healthy living (see description under Health), and how to work in an ergonomically correct position in order to avoid health problems. The interviews revealed that participation in the project was not part of a new management strategy, but rather that it helped systematize and make transparent the management values towards older workers.

Senior management expressed that the project created much value in facilitating a network of companies and municipality senior managers to discuss issue related to improving human resource activities in general and, specifically, retention of workers.

### **Best practice example 5: Implementation**

The project was implemented over a period of 10 months in 2013 and 2014. As described under the health section, there were issue related to implementation and 'uptake' among employees. One major lesson from this project is that it can be difficult to create/convince employees that there is mutual interest in sharing knowledge of well-being at the work place. In general, it can be difficult to overcome some employee's distrust of management's intentions.

The evaluation showed a small tendency for more employee to state that they would work until statutory retirement age rather than go on early retirement, however, the samples of employees aged 50+ are rather small (around 20-25 respondents).

### **Best practice example 5: Transferability**

In principle, this is an easy project to transfer. Companies can adapt human resource policies, which focus on retention and well-being. However, it also shows that impetus for a more systematic statement of and communication of policies around older workers had to come from the outside (the Cabi consultants). No new tools to prolong working lives were introduced. Rather, they were merely better communicated. It is also noteworthy that the senior manager of ServiceTeam Nyborg stated that the great value added for her was the opportunity to participate in a network of manager around activities to retain older workers and workers in general. Given the demand on managers' time, such networks have to be initiated and facilitated.

## 5 Flexible working times

### Best practice example 1: Sozial-Holding der Stadt Mönchengladbach GmbH, Germany

#### Best practice example 1: Description

In 2004 the first works council agreement on flexible working time was made. Meanwhile there are two agreements that focus on different target groups. The first is for the elderly care nurses; the second is for the other employees working in administration, training, placement and service. Agreements were updated in the past years; both include an annual working time account. The account allows easy compensation of working hours within a given time frame. A so called “traffic light account” with green, yellow and red phases is used to avoid a too high number of hours in overtime or negative overtime. For example, if elderly care nurses have a maximum of 21 overtime/negative overtime hours this counts as “green”. Between 35 missing or overtime hours the account switches to “yellow”. More than 35 missing or overtime hours indicate the red phase. Working less than 40 or more than 42 hours is not allowed. In this case the supervisor needs to reschedule the duty roster together with the employee and make sure that the account is back in balance.

For the employees in the nursing homes the following aspects are most relevant:

- Step in for colleagues only under certain conditions, but with more hours (important for part-time employees), this allows greater flexibility for all involved
- Short-term assignments are rewarded with a 30% provision
- Limitation of overtime hours, controlled by a “traffic light system” that indicates the level of worked hours
- More reliable planning of free weekends
- Limiting the night watch rhythm to a maximum of six consecutive nights and at least six working hours per night

Workers on short-term assignments, so called flex workers, spend 25% of their working time on call. Flex workers fill in when colleagues report sick. There are strict rules to announce if a flex worker is needed: four days in advance plus the day of announcement and the day of work. Flex workers earn an additional 30% per hour.

As reported in an interview it is not only difficult to have flexible working hours because of the requirement of a 24-hour-service but also because the managers and colleagues are not used to assign employees flexibly or to short shifts. Managers and colleagues need to be convinced to accept that flexible hours are helpful. Also, the transition from originally three shifts to flexible shifts makes the roster planning much more complex. Meanwhile over 200 shift models are possible.

### **Best practice example 1: Implementation**

See 'Description'.

### **Best practice example 1: Transferability**

The whole approach is transferable, whereas some characteristics are caused by the necessity of a 24-hour-service, so that 'flex workers' are e.g. not necessary in other sectors or occupations. Also, the idea to keep overtime/negative overtime within narrow limits is attractive in various sectors, albeit in some sectors/occupations task transferability is far lower than in the case of care workers (e.g. highly specialised work). Extra pay for short-term assignments depends on the economic situation; it is possible that in some sectors or for some companies/organisations this is not possible for economic or legal reasons.

### **Best practice example 1: Innovation**

Not innovative, but complete and elaborated

## **Best practice example 2: Wojewódzki Ośrodek Ruchu Drogowego (WORD), Poland**

### **Best practice example 2: Description**

WORD's philosophy implies adaptability to the workers and the wish to create an atmosphere at work in which flexible hours are accessible for any employee who needs them. Thus, WORD's employees, older or younger - who have young children, grandchildren or older parents to look after - have the possibility to work from home or to come to the office earlier in the morning to leave earlier in the afternoon, and vice versa. However, work positions involving consumer services prevent the employee to work flexible hours due to the fact that the hours are fixed. Despite that, employees working at these specific positions have the possibility to work part time, which enables rotation between the workers.

### **Best practice example 2: Implementation**

See 'Description'

### **Best practice example 2: Transferability**

Choosing to offer flexible working hours to older employees sees positive outcomes and is an easily transferable initiative which can be implemented in other companies and organisations, on the condition that the employees planning is well organized and well-managed.

### **Best practice example 2: Innovation**

Flexible working hours is one important elderly-friendly measure implemented by WORD. Enabling work/life balance is a crucial initiative since it encourages older workers to extend their working lives. Hence, the flexible working hours and days offered by WORD to older employees is an innovative HR policy.

### **Best practice example 3: UniCredit Group, Italy**

#### **Best practice example 3: Description**

Already for a long time the company allows for various and “classical” flexible working time arrangements to its employees, as flexible working hours and part-time contracts, teleworking, paid and unpaid leaves. These arrangements promote work-life balance of (even) older workers because they are available according to specific individual needs. Instead, an innovative initiative started thanks to the “Being Senior in UniCredit” project is the institution of the so called “Temporary Manager”, a new professional role aimed to value older workers and at the same time at providing another flexible working time arrangement to employees. Indeed the Temporary Manager, introduced as a new way for managing human resources/thinking about working careers within the company, has been conceived as a person who can substitute - temporally - a female worker having a role of responsibility within the company (e.g. bank director, manager) during her maternity leave. This arrangement allows the female manager to “have back” her role at the end of her maternity leave, without the risk of being permanently replaced by a new colleague who took up her role/work, which often happens in many cases/companies (at least in Italy). During her maternity leave, the female manager remains in contact with the Temporary Manager who is temporally working in her role, in order to be updated about working issues and to be ready once she returns to work. UniCredit have implemented experimental initiatives for Temporary Managers in some company’s “Regions” (i.e. North-Central; Center). Normally the Temporary Manager is an older employee, with a past working role or a background as a manager with high working status and important responsibilities (e.g. manager/director of banking branches/“districts”, etc.). Furthermore he/she has experienced a downgrading in the last years connected to the organisational restructuring of the company. Temporary Managers are older workers selected directly by the company according to specific evaluation processes made by the “Being Senior in UniCredit” project’s coordination team, taking into consideration experience, skills, relational abilities and competencies of those workers who are supposed to be able in carrying

out - temporarily - this new role. After the end of the maternity leave and the return of the female worker to the workplace, the Temporary Manager initiative stops, and the older person previously involved in that role starts again in doing his/her “ordinary” job (e.g. consultant, business consultant; consultant for investments, consultants for loans; commercial professional, etc.).

An example on how concretely this initiative works:

An interviewed older worker had an experience as a Temporary Manager for 8 months, from January to August 2014. The project’s coordinating team, after an evaluation process based on employee’s experience and potential for carrying out such role, contacted this older worker at the end of 2013, to ask him if he was interested in doing this activity. He accepted, since he thought that it could be an opportunity to return to get involved in a different and positive way in the company’s activities. Indeed in the past he had an important role within the company’s organisation: he was a manager, responsible for a significant branch of the company. But because of the organisational restructuring of UniCredit, in the last few years, he experienced a downgrading, even though his current job is still quite interesting and with responsibilities, as he is a coordinator of a team of so-called “consultants business first” (i.e. commercial consultants of customers with important economic portfolios). He was not scared to substitute temporarily a female worker employed as bank manager during her maternity leave. He carried out the “ordinary” tasks of the female manager, traveling twice a week to her office, that was located about 100 kilometres away from his workplace. The other working days he carried out some working tasks from his workplace, providing - when needed - technical support (by phone or PC) to colleagues of the female manager. On the basis of his experience, he suggested some adjustments for implementing this useful initiative, as to avoid to work as Temporary Manager carrying out simultaneously the “ordinary” work, because this is quite tiring. But apart from this, he was really satisfied with his experience, because he had the perception to be really valued and appreciated for his competencies by the company, regardless of his age. Furthermore, he had the feeling to be more motivated at work. He would also be available to do this again, if the company will need his contribution in such role. In general, according to all interviewed people, feedbacks about this initiative is really positive.

### **Best practice example 3: Implementation**

See ‘Description’.

### **Best practice example 3: Transferability**

By allowing and providing various flexible working time arrangements, UniCredit supports the reconciliation between work and family of its employees. The flexible approach promoted by the company is a key strength for extending working lives, since work-life balance arrangements are available according to specific individual needs of the older workforce.

Many of the flexible working time arrangements available in UniCredit are widespread and transferable in many other companies. Others flexible working time arrangements, as for example the mentioned Temporary Manager initiative, is very specific and innovative (less widespread) and it may be quite easily transferable to many other companies in need of replacing female employees in a position of responsibility, when they are in maternity leave.

### **Best practice example 3: Innovation**

The mentioned Temporary Manager initiative is a very innovative form of flexible working time arrangements available for employees, at least for the Italian context. The main reason is that it allows to value older workers employed (currently and/or in the past) as managers and at the same time it is a new tool of human resources management within companies.

### **Best practice example 4: InfraLeuna GmbH, Germany**

#### **Best practice example 4: Description**

With the life-phase oriented design of working times the different needs of older workers as well as workers in special familial situations are addressed (collective agreement „Zukunftssicherung“ 2012: 4).

The targeted relief of work burdens for older workers has the goal to facilitate employment below legal retirement age. One planned measure are age-appropriate working time arrangements, primarily in order to disburden employees in shift work. The overriding goal is the capability for shift work in old age (Interview HR department 2015).

On hitherto established concept has been old age leisure (Altersfreizeit). Within old age leisure employees have the option to (beginning with 55 for those with changing shifts and 57 in the day shift) reduce their weekly hours by 3.5 hours respectively 2.5 hours. The reduction gets considered in the planning of the shifts and applies until retirement. Due to the generally improved health status of employees over 50 the concept of old age leisure gets increasingly considered as outdated. Similarly, neither workers nor the company consider it worthwhile to work beyond the legal retirement age (Interview HR department 2015).

In contrast, „Vertrauensarbeitszeit“ (“trust working time”) is used often. It allows employees to flexibly arrange their working times. The principles of the within-company agreement are the autonomous design of the working times in the team as well as the inclusion of the employees in the planning of work and working times (company agreement „Vertrauensarbeitszeit“ 2007: 1). Benefactors are not only older workers but also workers in special familial situations. Amongst other things, this addresses the wish to pay better attention to younger employees, primarily parents. With this agreement the problem is addressed that shift work is increasingly unpopular amongst younger workers (Interview HR department 2015).

#### **Best practice example 4: Implementation**

See 'Description'.

#### **Best practice example 4: Transferability**

Flexible working times are transferable to most other circumstances. If the reduction of working hours *should* be transferred to other companies/organisations in order to reach the goal of longer working lives is open (see below 'Innovation'). Financing of reductions of working time without wage reduction to the same degree depends on company/organisation circumstances. Possibly acceptance (amongst younger workers) is higher in sectors with high physical/mental workload.

#### **Best practice example 4: Innovation**

It is unclear to which degree 'Altersfreizeit' contributes to longer working lives. Possibly retirement gets delayed, but effects on total labour supply until retirement (and beyond) are unclear. Positive effects only come into being if the loss of weekly working hours (intensive margin) is overcompensated by the gain in working years (extensive margin).

#### **Best practice example 5: Queen Alexandra College, UK**

##### **Best practice example 5: Description**

'Flexible Working' at QAC is used to describe any working arrangement where the number of hours worked or the time or place that work is undertaken vary from the standard practice within the different sectors of the college. QAC provides a high degree of flexibility to its staff, with provision including:

- Part-Time Working
- Flexible Holidays
- Job-Sharing
- Compressed Working Hours
- Annualised Hours
- Staggered Hours
- Flexi-time
- Working from home
- Teleworking

QAC's policy to flexible working applies to team members who have worked for the College continuously for 26 weeks. Requests are initiated by the employee and handled in conjunction

with Line Management and Human Resources. Applications are considered on the basis of the benefits flexible working provides for the individual employee, as well as its potential impact on teams and service delivery. While applications are being considered the College provides opportunities for small interim changes to working patterns etc. in order to best support employees.

The college recognises that flexible working arrangements provide key benefits to both employer and employees. QAC's policies develop a framework for developing permanent individual flexible working arrangements in order to meet the requirements of relevant employment legislations, such as Employment Rights Act 2002 and Work and Families Act 2006, as well as their commitment to promoting equality and diversity among employees. Furthermore QAC recognises how temporary flexible working arrangements can help staff balance commitments outside of work, therefore providing a positive working environment by enabling employees to achieve an appropriate work-life balance. Flexible working is also recognised to support managers in developing a more flexible workforce in line with service needs. As part of this it is recognised that flexibility plays a key role in retaining staff. This is of particular importance given the complex needs of the colleges' services users and the importance of providing a learning environment based on of continuity, structure and security.

Although the majority of requests are permitted, high demand for certain types of flexible working within certain positions within the college means provision is, in some incidences, nearing capacity. In order to avoid a detrimental impact on services some requests are subsequently refused. However upon refusal alternative arrangements are discussed in order to find the best compromise possible. If during the process of consideration it is unclear whether requests for flexible working are workable, trial periods are implemented in hope of being able to accommodate workers' request. As would be expected some jobs roles within the college are not always amenable to the types of flexible working made available. Teaching positions, for example, require set working hours. In these incidences alternative arrangements are pursued to the extent to which they do not prove detrimental to service delivery.

Older staff members described the ways in which general opportunities for flexible working enables them to extend working lives. Staff described how opportunities provided by QAC provided a bridge to post-employment; enabling them to address changing life demands. It also provides an opportunity for those who may want to continue to work for financial, health or social reasons.

### **Best practice example 5: Implementation**

See 'Description'.

### **Best practice example 5: Transferability**

QAC's mainstreamed approach to/flexible working is a key strength. This approach is indicative of its high level of awareness of the value of older workers and the need to retain their experience, which ensures services users and younger staff benefit from their knowledge. As such older team members describe being well supported and valued within the College.

### **Best practice example 5: Innovation**

By recognising the mutual benefits of flexible working times and the role it has in providing a positive working environment, QAC demonstrates a highly innovative organisational culture that helps to extend the working lives of older workers. By embracing opportunities for flexible working whilst ensuring they do not impinge upon service delivery, QAC strikes that crucial balance between meeting the needs of the organisation as well as staff wishes. This is most evident in their willingness to adopt trial periods of flexibility.

By providing reasonable adjustments for employees with disabilities, as well as distinguishing between general and disability-related sickness absence, QAC presents a highly innovative approach that extends the working lives of older workers. Adopting both proactive and reactive measures, QAC not only enables people with disabilities to work despite their health problems, but also removes potential disadvantage relating to the negative impact high absence can have in terms of promotion, references and/or selection for redundancy. Furthermore by providing support following all periods of absence, be they disability-related or not, QAC ensures consistent open lines of communication that enables all staff to work to the best of their ability. This not only provides clear benefits to the organisations in terms of continued productivity, but also helps mitigate any concerns that individuals and their teams regarding the impacts ongoing absence may have on workloads and services.

### **Best practice example 6: North Warwickshire Borough Council (NWBC), UK**

#### **Best practice example 6: Description**

NWBC operates a multifaceted approach to flexitime/flexible working. This primarily consists of:

- Not having standard core hours;
- Allowing employees to stagger their start and finish times;
- Permitting employees to work from home;
- Permitting employees a maximum deficit of four and surplus of sixteen hours in each four week period.

When applying these policies and procedures line managers, in consultation with HR, are enabled to use their discretion in the interpretation and application of guidance. This is to ensure the balance of both the wellbeing of employees and the requirements of the service. As such flexible working is explicitly identified as a mutual benefit to employees and the organisation. In line with this NWBC's policy toward flexitime / flexible working is described as operating upon a spirit of 'give and take' whereby the efficient functioning of the Council's services and the interests of the public are recognised as paramount. With effective lines of communication between employees, line managers and HR, most requests for flexible working are granted with sufficient prior notice.

### **Best practice example 6: Implementation**

See 'Description'.

### **Best practice example 6: Transferability**

NWBC's mainstreamed approach to flexitime/flexible working is a key strength. This approach is indicative of its high level of awareness of the value of older workers and the need to retain their experience, which ensures younger staff benefit from their knowledge.

### **Best practice example 6: Innovation**

NWBC's decision to not have standard core hours and to enable employees to have certain deficits and surpluses of hours with four-week periods demonstrates a highly innovative approach to flexible working. Flexible working is understood as a standard within MWBC which in turn enables all employees, including older workers, to freely make use. Crucially such provision is widely promoted within the organisation under the condition of the efficient functioning of the Council's services and the interests of the public. As such reasonable parameters are set within the organisation to ensure is continued viability.

### **Best practice example 7: Asda Stores Limited, UK**

## Best practice example 7: Description

### Various Forms of Leave

In addition to allocated holiday time, Asda provides various forms of short-term unpaid leave to its employees. These include

- 'My Time': Up to 5 days' unpaid leave in any one year (rolling basis) to attend to emergencies to deal with situations involving dependents, for planned events or simply a day off. This option notably includes extra time off for grandparents to spend with a new grandchild.
- 'My Lifestyle': Up to 12 weeks' unpaid leave or to work a reduced number of hours for the duration of the leave
- 'My Family': Up to 18 weeks' unpaid leave for each child born/placed up to the child's 5<sup>th</sup> birthday / 5 years after the placement. Only available to colleagues with up to 12 months service.
- 'My Health': Reasonable time off to attend medical appointments and donations.

Furthermore Asda also provides leave in the form of a 'Career Break', whereby colleagues with at least 1 years' service can take up to 12 months unpaid leave. Upon returning from a 'career break' team members are entitled to return to a job on the same grade and pay.

All requests for additional leave are given fair and reasonable consideration and considered on a case by case basis. To safeguard against potential discrimination all rationales and decision making processes are recorded and kept on file. Decisions regarding requests for leave are made in conjunction an analysis of the impact they will have on the business. These will vary upon the format, size and function of the individual's role.

### Adjusting Working Patterns

Asda provides various options for adjusting working patterns, including:

- Job Share: A formal contractual arrangements whereby two colleagues working part-time can share a job.
- Part-Time Working: This is where employees can work fewer hours that full-time colleagues. This process is aided by a Colleague Flexible Working Self-Assessment form which team members are required to complete in order to request part-time hours. This helps team members identify whether or not flexible working is appropriate for them and their position within the company prior to approaching line management or HR. Asda does not operate a minimum hour's policy and therefore provides highly flexible working opportunities. However it is acknowledged that some roles may not be suitable for part-time working and that the needs of particular areas of business may be more amenable to part-time working than others. Part-time workers are explicitly identified as being protected from being treated less favourably than equivalent fill-time colleagues at Asda

- **Shift Swap:** A formal process of request whereby colleagues can arrange single shift swaps by liaising with other colleagues to agree a suitable arrangement.

Although Asda employees do not have a legal right to make multiple requests for flexible working during any 12 month period, any additional requests are considered upon their own merit and may still be approved, depending upon individual circumstances.

### **Best practice example 7: Implementation**

See 'Description'

### **Best practice example 7: Transferability**

Asda's leave provisions and highly flexible approach to working is a key strength in extending the working lives of older workers. By embedding a high degree of flexibility older workers can achieve a work/life balance that suits them. The fact that these various forms of leave are coupled by opportunities for flexible working arguably mitigates disadvantage for those who cannot afford to take unpaid leave. In particular swapping shifts seems to be a key way to reduce absence levels and avoid having to take unpaid leave or holiday, whilst ensuring the departments are still able to function without affecting service levels, absence rates or the colleague's pay.

The extent to which the high degree of job flexibility Asda possesses is transferable to other organisations is questionable and contingent upon capacity. Asda has a large resource of team members that safeguards their operations from both short and long-term shortages. Therefore the risk of offering such extensive provisions within smaller organisations is arguably much higher. Furthermore given that the UK has a strong policy stance that identifies age as a specific protected characteristic as part of the Equality Act 2010, the extent to which this focus can be replicated in other countries is unclear.

### **Best practice example 7: Innovation**

Asda's provision of several forms of leave and varied options for flexible working demonstrates a highly innovative approach that attempts to provide employees with as much flexibility as possible. The fact that provision of flexibility takes both unpaid and paid forms arguably mitigates the disadvantage team members on lower incomes may face when attempting to work flexibly.

### **Best practice example 8: Rimi Latvia**

#### **Best practice example 8: Description Rimi Latvia**

Rimi Latvia provides an opportunity for their employees to work flexible hours. This initiative is particularly important for vulnerable groups such as older workers, young people and people with disabilities because of their personal reasons. For example, older workers and people with disabilities might prefer working less due to their health condition, while young people might want to work less in order to study parallel to their paid employment.

#### **Best practice example 8: Implementation Rimi Latvia**

The company signs a contract with its employees for part-time summed working hours equivalent to 20 hours a week. Then an employee can choose (on shift basis and by coordinating with a supervisor) whether to work full-time working hours' equivalent (40 hours a week), less or more - up to maximum 56 hours a week (including part time hours) as established by the Labour Code.

#### **Best practice example 8: Transferability Rimi Latvia**

With respect to transferability, the initiatives are fairly easy to understand and to transfer to other company practices. In order to transfer the initiatives to other companies, a company should understand the current situation with respect to employee diversity, define whether diversity is a goal of the company and most importantly allocate big effort to individual communication with employees to ensure that everyone is "on the same page".

#### **Best practice example 8: Innovation Rimi Latvia**

The measures could not be brought out as innovative.

#### **Best practice example 9: Hero, Spain**

Hero Spain is a branch of Grupo HERO, a multinational in the food and drink industry sector. The Spain's branch is in Alcantarilla (Murcia), where it was established in 1922.

#### **Best practice example 9: Description**

Since the mid 1970s, *Hero España* has adopted an advanced strategic human resources policy that is fully endorsed by management and employees. It is based on concepts of employees' personal development, team work, and the employees' identification with the corporate culture and social responsibilities of the company.

In relation to age management, Hero Spain implements a series of initiatives, which can be summarised with the following measures:

-Hero Spain accepts and supports the option of *partial retirement*; those workers older than 60 years (but below the 65 years threshold) can reduce their working hours if they wish to follow a more gradual retirement path. In these cases, a younger person is usually hired to cover for the reduction in working time of the senior person. This partial retirement scheme facilitates the older worker's adaptation and preparation for retirement. This also facilitates the transference of knowledge, and has beneficial effects on inter-personal communication and team building skills.

-Hero Spain applies a specific recruitment policy that is not “age-discriminatory” and is based on objective, measurable criteria. As well as in its recruitment plans, Hero applies non-discriminatory criteria in a wider range of areas, such as training, promotion, wages, dismissal, and retirement procedures.

- Hero Spain also offers employees a range of other benefits rooted on the concept of social responsibility. For example, Christmas gifts for retired workers, gifts and extra remuneration for workers with 25 or 40 years of seniority, paid trips, social events specifically organised for retired former employees. Hero recognises and values the loyalty and commitment of senior workers; for example, extra holiday days are given to workers older than 50 years, annual bonuses are given to workers for each additional year worked in the company, and additional bonuses after 5 years of work at the company (subject to profit making conditions).

-The operation of Hero Spain is characterised by a high level of flexibility in working time arrangements, which ensures the adaptability of work shifts to personal circumstances and family obligations, as well as to health conditions.

### **Best practice example 9: Implementation**

Following a collective agreement, the company has a firm commitment to not discriminate workers when drawing their recruitment plans, retirement plans, training activities, and promotion decisions, and is committed to consider individual merits regardless age, religion, gender, nationality, union activity, sexual orientation, disability etc. This is an important issue, as, since the financial crisis, many disadvantaged workers (e.g. older workers) have found very difficult to stay on re-enter the labour market, as firms opted for hiring highly-qualified younger workers (that often lacked in experience) but that could work for lower wages.

The implementation of a fair and objective recruitment strategy, that does not discriminate older workers, has had a positive impact on the worker's morale and motivation; this is reflected in the lack of internal conflicts or strikes in the organisation over the last 25 years. It is also worth noting the lack of work accidents in the workplace, which is also a reflection of good working conditions.

### **Best practice example 9: Transferability**

Hero's age management strategy is applied in conjunction with other human resources policies. The introduction of better age management is recognised to be more effective when implemented with other management practices. It is essential that workers feel fully

integrated and identified with the ethos of the company, feel motivated and encouraged to learn and grow and are rewarded accordingly. This should be regardless of the age and position. Concerning age in particular, explicitly recognizing the role of older workers in the organisation, and showing the way they can exert important contributions to the company should be a very valuable lesson.

Job satisfaction of employees is a very important aspect in order to achieve a healthy working environment, and Hero is investing and making efforts to keep their employees happy and motivated. Lack of motivation is one of the reasons why many older workers in Spain tend to push for an early retirement. Seven years after the financial crisis, the Spanish economy is still characterised by weak economic conditions, which may have detrimental effects on workers' morale; in particular, older workers approaching retirement age that have witnessed many years of financial struggle and that are not satisfied in their jobs, will be more prone to exit the labour market as soon as it is possible.

The application of innovative age management practices at Hero Spain is embedded in a wider human resource strategy that shows that it is possible to apply principles of social responsibility while also achieving market success.

### **Best practice example 9: Innovation**

The use of hand-over contracts in conjunction of a part-time contract is a rather innovative legal formula to deal with retirement of workers, and that is still rarely seen in Spanish companies. While this is allowed by law (article 166 de la Ley General de la Seguridad Social), the number of companies that use these, or that consider that they are useful and valuable, is relatively small. The usual formula used by y large companies in recent decades was to encourage the early retirement of many employees over 50 years, by providing them with generous compensation schemes. This "radical" early retirement however did not usually contemplate an overlapping period where an older and younger worker would establish a working relationship designed to facilitate the process of knowledge transfer.

Hero's management culture promotes the full integration of older workers in the life of the company, and allows them to experience a "smooth transition" to retirement, which can be beneficial, both for the retiree and trainees, as well as for the running of the company and long-term prospects of the business. Recognising these involves having a vision of future and it is consistent with the application of an overall innovative dynamic management style. For example, an innovative feature is the definition of jobs at Hero. Rather than being considered as 'fixed' or 'stable' jobs at Hero Spain are considered to be continuously evolving, are multi-disciplinary and adaptable, and require of individuals that have versatility, creativity and entrepreneurship. There is also a commitment to invest in training of employees and tools to support internal promotion and individual development.

## **6 Reconciliation of paid work and family**

## **Best practice example 1: Sozial-Holding der Stadt Mönchengladbach GmbH, Germany**

### **Best practice example 1: Description**

“Netzwerk pflegende Beschäftigte” (network for employees with elderly care responsibilities) was founded to help employees as well as employers in frequently and suddenly appearing situations in which they have to care for relatives (<http://www.pflegend-beschaefigte.net>). Sozial-Holding was a co-founder of this initiative. Guidelines, check lists and information material can be found on the website. Even events, information courses and contact persons are offered by the network. A blog and a forum can be used to exchange personal experiences and to pose questions.

The Sozial-Holding also offers “Familienpflegezeit” (care leave), a measure that was introduced by the German government. Familienpflegezeit is an agreement that allows reducing working hours with no less than 75% of the salary for a maximum time span of two years. After care leave the respective employee balances out his negative overtime. The employer is secured by the government in case the employee does not return to work or other lack of work occurs. However, Familienpflegezeit is no measure that the employees of Sozial-Holding make use of.

### **Best practice example 1: Implementation**

See ‘Description’.

### **Best practice example 1: Transferability**

“Netzwerk pflegende Beschäftigte” (network for employees with elderly care responsibilities) is transferable to other countries.

One part of ‘Familienpflegezeit’ is that government steps in if employees do not balance out their negative overtime after care leave, that is, if they do not return to work or other lack of work occurs. Companies/organisation need some safeguarding for such cases. One problem is the unpredictability of care obligations. The maximum period of two years could be too short, on the other hand otherwise employees would accumulate considerable numbers of negative overtime hours.

### **Best practice example 1: Innovation**

“Netzwerk pflegende Beschäftigte” (network for employees with elderly care responsibilities) is a regional network

## **Best practice example 2: InfraLeuna GmbH, Germany**

### **Best practice example 2: Description**

InfraLeuna is committed to a consequent implementation of a family-friendly HR policy. Besides flexible working times there are agreements concerning the financial and social support of employees, especially of those with families (collective agreement „Zukunftssicherung“ 2012: 4).

Under the slogan “family-friendly chemical site Leuna”, together with three partners in 2005 InfraLeuna has forged an alliance for the better reconciliation of work and family (InfraLeuna GmbH 2015a). In 2006 the “Servicebüro Beruf und Familie” (“service office job and family”) emerged from the alliance, which is a crucial contact point for all employees of the companies at the site. The service office informs and supports the employees in all questions of reconciliation of job and family. Support and consultation are free of charge. Amongst the services of the office are e.g. support in the search for childcare services as well as in the search for consultation services for issues such as maternity protection, parental leave, parental allowance, health etc. Further, there are offers for the placement of care facilities. Due to the close cooperation with the local municipalities and authorities as well as care and child care facilities and information centres it is possible to offer interconnected help tailored to the individual case. According to the works council the offer is widely used (DIHK Service GmbH; Interview HR department 2015; Interview works council 2015). The flyer (in German [http://www.infraleuna.de/fileadmin/infraleuna/downloads/Flyer\\_FSL.pdf](http://www.infraleuna.de/fileadmin/infraleuna/downloads/Flyer_FSL.pdf)) shows the office’s services.

Goals of the alliance are the improvement of the social framework conditions for employees at the Leuna site as well as the creation of a positive image of the site and the companies via better reconciliation of work and family. This is supposed to foster employees’ commitment to the company as well as their motivation and satisfaction at Leuna. Main emphasis is put on the promotion of the acceptance for familial and social issues (Bündnis Familienfreundlicher Chemiestandort Leuna, undated).

Besides the offers provided by the service office, employees can use legally guaranteed services for private care. So far, this offer had been rarely used, probably partly due to the high share of male employees (70%) (Interview HR department 2015; Interview works council 2015).

### **Best practice example 2: Implementation**

See 'Description'.

### **Best practice example 2: Transferability**

For a “service office job and family” financial means are necessary, yet it is effective if one actor stays updated on information and informs other actors (employees) instead of the alternative, that is, every employee has to collect information for himself/herself. Naturally, a minimum company size is necessary to keep the office busy, whereas it is possible that several companies maintain one service office together (as is done in Leuna, so the office covers not InfraLeuna’s 680 employees but the approximately 9 000 employees at the Leuna site).

### **Best practice example 2: Innovation**

A service office for employees of several companies at the same location is an innovative idea.

### **Best practice example 3: North Warwickshire Borough Council (NWBC), UK**

#### **Best practice example 3: Description**

##### Carer’s Leave

In addition to opportunities for flexi-time/flexible working NWBC operates a system of ‘Carer’s Leave’. Carer’s Leave has been a part of NWBC’s policies regarding flexible working since October 2009. Employees who register with their line manager and HR as a carer are allowed to bank up to a maximum of two weeks of their weekly contracted hours for time off in lieu. These are to be used in either emergencies or planned hospital visits for the person/persons they are caring for. As a general rule employees are only permitted to take a maximum of three weeks carer’s leave in any twelve-month period. However this can be extended at the discretion of the relevant line manager.

The policy broadly defines a ‘carer’ as anyone whose life is in some way restricted because of the need to take responsibility for the care of someone else. The initiative therefore explicitly recognises that caring responsibilities are not just restricted to those with children, but also those who care for a person with a disability or an elderly person. All forms of leave NWBC make available to staff are regarded as a separate entitlement. Therefore employees who bank hours for Carer’s Leave are in no way disadvantaged in any concurrent or subsequent requests for flexible working, other than the additional demand this may place on their services and teams. NWBC’s approach to Carer’s Leave is beyond statutory requirements and demonstrates a progressive move to pre-emptively address the barriers older workers, as well as other employees, may potentially face with an ageing population.

### **Best practice example 3: Implementation**

#### **Best practice example 3: Transferability**

NWBC's policy toward Carer's Leave is a well thought-out policy that operates successfully as part of the organisations broader approach to flexible working. By specifically allocating employees with care responsibilities opportunities for leave this policy formally puts in place a hierarchy of need. This is well recognised and appreciated by employees, whether they make use of the policy or not, and fosters a great deal of good-will. This is in part facilitated by how well HR policies are publicised within the organisation, which promotes a culture of transparency and gives employees a well-rounded sense of fairness. Since the onus is on employees to register themselves as carers prior to requiring leave, this policy relieves the organisation from having to facilitate demand at short notice. Similarly since the responsibility is on employees to accrue hours, the scheme does not present any financial risk or potential loss to the organisation. Arguably it offers an opportunity to *prevent* loss through careful absence management of employees with care responsibilities.

Currently only a small proportion of the NWBC workforce make use of Carer's Leave. Herein lays a potential threat that increased demand could negatively impact upon the running of the Council. In anticipation of this NWBC has integrated a clause within its policy that explicitly states that should demand out-weigh supply amendments may need to be made.

#### **Best practice example 3: Innovation**

NWBC's provision of Carer's Leave presents a highly innovative and progressive approach to reconciling paid work and family life. Provided supplement to more general opportunities of flexible working, NWBC's provision of Carer's Leave simultaneously enables the extension of working lives, fosters good relations between staff, and ensures the effective running of the service.

### **Best practice example 4: 16 companies / organisations in Germany**

Measures in companies located in Germany take place against the backdrop of the legal situation. As an unpublished report (Bauknecht, 2015) states (emphasis added):

**“Independent of company size:** In acute cases, employees have the possibility to stay away from paid work for up to ten days. There is no prior notice period (since it is for acute cases). Before 2015 this leave was unpaid, since 2015 there is a substitute payment from the care insurance (‘Pflegeunterstützungsgeld’ or ‘Care Allowance’).

Further, **in companies with 15+ employees**, employees have the legal entitlement to stay away from paid work partly or totally for up to 6 months in order to care for a close relative in his/her homely environment. Since 2015 employees can get an interest-free loan from government to cover income losses. Normally this is paid back in instalments, but in special cases this can be deferred. In some cases it can be possible that the employee has to pay back only parts of the loan or nothing.

**In companies with 25+ employees**, employees have the legal entitlement to reduce their weekly working hours to at least 15 hours per week for 24 months in order to care for a close relative in his/her homely environment. Also here an interest-free loan from government can be paid out to cover income losses (same arrangements as above). These 15 hours are the weekly mean calculated over the whole year, so that in the ‘bloc model’ the employee can be totally absent from work for some time.”

The ‘audit berufundfamilie’ (jobandfamily) defined 8 areas for the reconciliation of work and family. The following subchapters are organised according to these 8 areas. The following 8 chapters are based on the case study by Bössing/Bauknecht (2015):

## 1. Working time

**Villeroy & Boch, a producer of high-end ceramic/porcelain (about 7,300 employees worldwide)** offers employees flexible working times in order to enable them to care for relatives. Further, the company has a programme for family care leave which is to be further developed. Rules are laid down in a 2012 company agreement; besides flexible working times the agreement also allows for working time reduction for employees with care obligations. Given the high number of average hours necessary for family care in this necessity occurs, possibly a reduction of working time is more useful than flexibility. The company emphasises individual tailor-made solutions. If necessary, employees with care obligations can get a personal conversation with company leadership, the works council and the responsible department in order to facilitate working time flexibilisation/reduction for the reconciliation of paid work and family care.

Also **perbit Software GmbH (65 employees)** emphasises life-phase oriented models of flexible working times. Trust-based working hours apply to all employees and control of working times does not exist in favour of time autonomy and a results-oriented culture. Employees with care obligations can get a trial part-time job, so that working hours can get reduced for 3 months. After this 3 months employees can decide if they prefer the part-time model or if they want to return to their prior number of working hours.

Similarly, at **Fraport (20,000 employees, operating company of Germany’s biggest airport at Frankfurt/Main)** can get into a part-time job, either permanently or temporary. Further, the working teams help to create the shift plans and therefore can change the speed of rotation, exchange shifts between employees etc.).

**B. Braun Melsungen (5000 employees at the main site Melsungen - the company has subsidiary companies worldwide), offering pharmaceutical/medical products on the health**

**market**, offers its employees more than 200 part-time models and more than 60 shift work models. Employees can choose the model suiting them best (dependent on their tasks and their familial background). Further, since 2007 based on a company agreement the company offers 'family part-time'. Employees can reduce their working time to 50% and get a bonus of 15% in case they care for severely sick relatives. Since care obligations can begin suddenly, this part-time model can be obtained with short lead time. Further, employees can have a break in their employment relationship as long as the relative's sickness endures, with a maximum duration of 3 years (in special cases 5 years are possible). The right to return to work is guaranteed. The company offers an internal consultant for these models or for necessary changes in shift work plans.

**Aareon AG (real estate sector, 1,200 employees)** offers paid leave for up to 6 weeks. Employees can catch up with the loss of working time within 12 months after the end of paid leave.

## 2. Work organisation

The **chancery DWL Döcker und Partner (50 employees)** offers its employees laptops for home office in sudden cases of emergency. Further, already at the beginning of care obligations the chancery tries to pay attention to the employee's needs and to adjust working plans to this situation (e.g. these employees are not included in long-term projects).

**B. Braun Melsungen** offers job sharing models in the manufacturing area. In this area due to shift work an intense coordination of working plans with colleagues and superiors is necessary. In the case of job sharing two employees share one full-time job. In future a part-time board will offer part-time opportunities also for white-collar workers.

The **kfw Bankengruppe (a public development bank , 5,700 employees)** offers job sharing for executives and head a department together and at the same time reconcile work and family.

**Merz-Pharma GmbH & Co. KGaA (2,700 employees)** offers, based on the "Gesamtbetriebsvereinbarung Medien" (General Works Agreement Media), its employees the private use of telephone, internet and email at work. Also, external workers were connected to the company's intranet. This provides the technical preconditions for the necessary information and communication with internal and external actors for the reconciliation of job and family.

## 3. Job location

At **Merz-Pharma GmbH & Co. KGaA** since 2009 alternating telework is laid down in a company agreement. If the superior agrees employees with suitable jobs can work at home between 20% and 60% of their working time. Also – again if the superior agrees – employees can work at home on some (irregular) days. These possibilities support employees with care obligations e.g. at the beginning of care phases in which they have to organise care, or in critical intermediate phases.

Also **Vodafone D2 GmbH** offers its employees home office for 20% - 50% of their monthly working time. Currently this only applies to the German headquarter in Düsseldorf. At other sites the regulation 'Flexible Office' allows work at home for up to 20% but the company heads to an expansion to 50%.

Also experts suggest a combination of work at home and in the company. They advise against work at home for the full working time since this could lead to coordination problems (berufundfamilie gGmbH 2009: 18).

#### 4. Information / communication policies

The **publishing group Georg von Holtzbrinck GmbH Stuttgart (3000 employees)** initiated its 'Elder Care-Programm' in 2008 and informed first executives and then employees via circular mail. The issue reconciliation of work and family – and therefore also elderly care if necessary – is an inherent part of the annual appraisal interviews. In internal events lecturers from an external family service inform employees on (legal, healthwise, scientific) issues concerning Elder Care. Further, the annual 'Infomarkt' on the topic 'reconciliation of work and family' offers opportunities to employees to listen to experts on the topic Eldercare as well as the become familiar with the offers of the local service provider.

The **health insurance AOK Hessen (3,600 employees)** provides its employees a 'emergency information kit' titled 'fit for the case of emergency'. Main target group are not only employees in acute care situations; also a preventive information of all employees concerning this issue. The personalised emergency information kit also contains important phone numbers and personal data like power delegations and orders (the topic here are the rights of relatives of dependent persons, e.g. to decide for dependent persons). Further, the kit contains important (pre-printed) forms. The information kit can be order at the HR department and contains the name of the employee.

The information kit raised employees' knowledge on internal services for employees with care obligations as well as attention given to the issue. Further, for affected employees it is easier now to raise the issue of their situation, since the communication from the company fostered to view that the reconciliation of work and elderly care is as important as the reconciliation of work and child care.

**Merz-Pharma GmbH & Co. KGaA** informs employees on works meetings and talks on the possibilities of reconciliation of work and elderly care. Here the focus is on male employees and examples are mentioned where men care for relatives. This is aimed firstly on a removal of taboos concerning this issue, and secondly the aim is diminish the view that elderly care is only an issue for women. With the targeted appeal the company gets positive feedback, and acceptance of the issue 'care and work' rises. This is the basis of further supportive measures offered by the company, which are used by men and women.

At the 2012 company competition 'Erfolgsfaktor Familie' ('Success factor Family') **Siemens Inc. (115,000 employees in Germany, 342,000 worldwide)** received the special prize in the category 'work and care'. Since 2006 'Elder Care – Betreuung und Pflege von Angehörigen' ('Elder Care - Care and support of relatives') is a main part of reconciliation of work and family.

The company informs on the programme via various channels. Flyers and posters underscore the issue's importance. Further, Siemens developed the 'Elder Care Portal'. This is a digital platform for employees with acute care obligations. Employees can enter the platform via the company intranet or via (password-protected) the internet and receive fast and suitable information. Cooperation with a family service ensures consultancy by experts for employees. **Vodafone D2 GmbH** uses the information portal 'mHUB' and an app for mobile phones to offer employees at home information on care issues.

Within the context of its internal family service, **Fraport** offers a systematic demand evaluation (as far as possible): Timely and good planning is advantageous for the company since this is crucial for frictionless operations flow. There is a huge variety of tasks at Fraport and shift work is part of it.

On the 'Infomarkt Pflege' Fraport educates its HR managers with issue-specific knowledge and enables them to talk to experts in the frame of an afternoon event and a series of 30-minute lectures as well as info booths. This happens in cooperation with the Frankfurt Association for Elderly Care, Caritas (a welfare organisation of the Catholic Church), Diakonie (a welfare organisation of the Protestant Church) and further actors. This got positive feedback from HR managers.

## 5. Leadership skills

At the **health insurance AOK Hessen** the issue 'work and care' is an inherent part of obligatory further training for executives. Contents are thematically integrated into the module 'Diversity Management'. One goal is to inform executives on the economic relevance of the issue and on the importance of adequate support of employees by executives. Due to the positive experiences from further training for executives this is also integrated into the bachelor degree course of AOK Hessen where future executives and specialists are trained.

Also **Aareon AG** focuses on executives for the issue of work and care. Based on the view that realisation on executive level is crucial for a company culture paying to the reconciliation of work and care, the issue was raised for the first time on the executives meeting in 2010. On this meeting an expert informed on this issue and pointed out the relevance for a societal view and a company view. In order to signalise to employees that company leadership pays attention to this issue and supports the reconciliation of work and care, an interview with the CEO has been published on the company intranet.

## 6. Staff development

Employees with care obligations take part in further training less often than those without care obligations, especially in the case of further training courses outside of normal working times and/or at a different place.

In the **Daimler** factory Wörth (11,300 employees there) there are so-called 'break models' (Pausenmodelle) for employees with care obligations. Employees can get up to one year of unpaid holidays or can leave the company for up to 3 years with the possibility of re-

integration. This is often used by employees with care obligations. In contrast to parent who are obligated to take part in further training during their break (up to 4 years) employees caring for older people are not obligated to take part, but it is clearly expressed by the company that further training participation during the break is highly welcome. Employees in care break take part in further training considerably.

The internet platform '**Vodafone** at home' offer carers (of children or older people) possibilities to stay in touch with Vodafone and to get information on current developments in the company. This is aimed at optimal integration of employees during care breaks.

## 7. Remuneration

The **perbit Software GmbH** offers employees paid leave for two days per year in particular difficult familial situations. Further, the company exceeds the legally guaranteed provision of 10 days for care (see policy report) and offers 15 days instead with 50% payment. The precondition is a proof that the relative has the level of care 1 (means, amongst other things, that the daily care effort is at least 90 minutes).

## 8. Service for carers

The **perbit Software GmbH** offers employees has a simple solution: For weekend trips or visits to the doctor a wheelchair is provided.

The **Allgemeines Krankenhaus Celle (hospital, 1,900 employees)** has made positive experiences with self-help groups (this contradicts experiences of the berufundfamilie gGmbH). In the context of seminars on the issue of elderly care (in cooperation with the local dementia initiative and health insurances) a self-help group emerged. The groups meets once in a month to discuss experiences in private elderly care. Further, affected employees can use the hospital's social service. Consulting services are supposed to prevent excessive demand on employees and a possible loss of workability.

**Henkel AG und Co. KGaA (47,000, washing powder, cosmetics and glue)** has the department 'Soziale Dienste' ('social services') for more than one hundred years; it developed into an internal service provider. Amongst its offers is on the one side psychological individual counselling and on the other side organisational and preventive offers in order to support caring employees. One of the advantages is the non-varying contact person for employees. Additionally since 2009 there is the programme 'Care Support – Pflegebegleitung im Unternehmen' ('care accompaniment in the company') which has as a spin-off a monthly round table for caring employees, moderated by the head of the social service and another colleague. Employees talk about their experiences and frequently experts are invited to inform on issues selected by the group. A scientific evaluation based on a long-term study will show how the project can be further developed.

**Volksbank Karlsruhe (a bank)** initiated the project 'PflegeINITIATIVE' in 2013. A contact person within the company knowledgeable on care issues has been appointed. This ensures a fast information flow and a fast offerings of further support. Further, the bank cooperates with the Senior Office of the city of Karlsruhe (300,000 inhabitants) and the Caritas

Association. Twice per year there are open 'Pflegesprechtage' (Care Advice Days) within the Volksbank's premises; employees can get consultancy there from the expert on older people of the Caritas. The offer is also open outside of these Care Advice Days, contact details can be found on the bank's intranet. Further, there are individual coachings/individual counselling by internal coaches who support affected employees.

Also **Siemens Inc.** offers a wide range of external services. Amongst other things there is a cooperation with the family service, providing free consultancy from experts to employees. Further, free telephone consultation is offered from 7 until 20 o'clock. Here, employees are forwarded to experts in order to get consultancy soon. Further, there are frequent series of lectures at different company sites. In the so-called 'Feierabend-Akademie' ('Home Time Academy') experienced speakers inform the audience on various issues, such as financing of elderly care, preventive patient care or payments from statutory nursing funds. In order to facilitate Germany-wide participation, employees have the possibility to view the events via 'Live-Meetings'. In some Siemens sites there are additional offers, e.g. in Munich (where Siemens is headquartered) there are offers in dementia consultancy in cooperation with the Alzheimer Gesellschaft München e.v. (Alzheimer Society Munich).

Partly similar to self-help groups, at **Fraport** caring employees are multipliers within the company 'Netzwerk Pflege' ('Network Care').

#### **Best practice example 4: Transferability**

The eight areas depicted above are field-tested and provide good orientation for companies/organisation starting measures for the improvement of the reconciliation of work and care. Authors point out that larger companies have more possibilities than smaller companies, yet this is not crucial for the success of measures offered. As Auth (2015: 12f.) notes, a culture of trust within the company is far more important for success in the area of work and care. Already small offers show employers' willingness to help and their understanding for employees in these difficult situations. For example the above-mentioned company **perbit** lending a wheelchair to employees for their weekend trips or doctor visits together with dependent relatives shows that small low-cost/low-effort measures can have impact. Further, most companies cannot cover all areas mentioned above, yet single measures can have considerable impact if these measures are suited to employees' needs. These measures' effect on employees' ability to reconcile work and care are not evaluated. For example, analyses of developments of sickness absence could give first insights into effectiveness. This also applies to analyses of company exits.

## 7 Unemployment

### Best practice example 1:

#### **Sdružení pro vzdělávání komunit [Association for education of communities]**

**Czech Republic**

**Project: Podnikáme SPOLU (We do business TOGETHER, WdBT)**

### **Best practice example 1: Description**

The association for the education of communities - AEC (Sdružení pro vzdělávání komunit) is a non-for-profit organisation located in Ústí nad Labem in the north-west of the Czech Republic. It operates in close relationship with the Centre for Community Work (Centrum pro komunitní práci) and is involved in projects aiming to support the social and professional integration of disadvantaged people, promoting pro-family policies, work/life balance and equal opportunities.

The main goal of the organisation is conceptual work in the field of community development and preparation of projects for external funding. In the time of the project realisation and under its scope, four regular employees and three additional work places have been created.

The project “We do business TOGETHER” (WdBT) was realised under the project call within the European Social Fund - The Human Resources and Employment Operational Programme (HROP).

The purpose of the project was to help women aged 50+ and women after maternity/parental leave to return to the labour market through different means such as education, practical training, retraining, motivation as well as assistance in job seeking. This support was also provided in the form of individual consultations with a personal coach.

The project aimed at motivating the participants to return to the labour market by choosing professional activities such as self-employment, even though this particular goal was not reached. Indeed, participants did not succeed to overcome their fear of failure often linked with starting a business. The participants expressed their concerns regarding the risks related to starting a business at old age, and explained their preference for the simplest kinds of jobs that would help them to fill their time until retirement. Women after maternity are the ones – among the participants’ group – who are the most interested in starting their own business. Indeed, being their own boss allows young mothers to work flexible hours and work/life balance, hence their increasing choice of that kind of career path which also led to a new concept: “mompreneur”. However, those young mothers also often experience hesitation about taking this kind of decision because of potential financial problems their business might have to overcome (fear of credit, debts, bankruptcy).

The project successfully established an intergenerational platform and equipped the participants with the skills needed for a successful return to the labour market.

The project also refers to self-employment and is depicted in the respective chapter below.

## **Best practice example 2:**

### **FALA s.r.o. recruitment agency**

**Czech Republic**

**Project: GO 50 GO**

#### **Best practice example 2: Description**

The project “GO 50 GO” is an initiative operating under the recruitment agency FALA s.r.o. Its main task is to improve the situation of long-term unemployed professionals over the age of 50 who are struggling to get recognised and included in the hiring process. The key activity of the project is mediating relations between the target group and HR managers or employers. The purpose of this effort is to change the stereotypical approach towards the group of older applicants who are commonly perceived as slow, lacking skills and unsuitable for various reasons. Hand in hand with this effort, “GO’s” activities aim at improving the knowledge of older unemployed job applicants about labour market regularities as well as improving their self-confidence for job interviews. Further, they are helped to “sell themselves”, that is, to present themselves in a positive light. Moreover, mutual support and strengthening of self-esteem and motivation among older people are also among the objectives of the program.

There are two major specificities about the project “GO 50 GO”: First, all representatives, lecturers and providers run this project voluntarily without any financial compensation; and second, the programme is addressed to people over 50 who graduated from higher education.

The target group of the project “GO 50 GO” is qualified unemployed people over 50. Only people with tertiary education are involved in the project. This educational specificity was not intentional as it originated from the target group itself: all the individuals – older unemployed professionals - happened to share this characteristic.

Apart from the unemployed elderly, the project “GO 50 GO” also focuses on recruiters and employers. The project addresses the stereotypes that recruiters sometimes express towards older job applicants and which can be expressed as “ageism”.

The project’s key measure is mediating encounters between HR departments, employers and the target group through regular conferences. Informal meetings as well as collective sharing of information and experience assists recruiters in seeing past alleged deficiencies of older workers and omit stereotypical thinking about this target group. This form of meetings enabled a few participants from the target group to get an invitation for a job interview and two of them got a full time job offer.

The project “GO 50 GO” offers courses and lectures aiming at improving the participants’ various competencies – mainly soft skills, computer skills and knowledge related to the labour market and job applications. The project is not focused on consistent vocational training.

#### **Best practice example 2: Implementation**

The key driving force for creating the project “GO 50 GO” was the identification by FALA of distinct groups of clients meeting difficulties while looking for a job. FALA director and founder of the “GO 50 GO” program, Ing. Lada Vávrová, is driven to solve the problematic situation of the identified target groups.

The functioning of the project GO 50 GO is based on the recruitment agency FALA s.r.o. which provides both key personnel through their own employees and representatives as well as room facilities for regular “Club Meetings” and other activities related to the project.

The project “GO 50 GO” is supported by various employers, their representatives and also by “The Association of Small and Medium Sized Companies” in the Czech Republic. Their interest allows the project to pursue key tasks – such as breaking the stereotypes about ageing and supporting equity on the job market - since solving these issues needs cooperation of all parties at stake.

Voluntary lectures and speeches given by various professionals from different fields allow the project to create relevant content that impacts positively on the target group.

Official patronage of the project “GO 50 GO” is held by The Ministry of Labour Force and Social Affairs of the Czech Republic, other formal structures are not involved.

The organisers of the programme work on breaking the stereotypical approach recruiters may have towards the target group of older applicants during the recruitment process. Older applicants are often excluded from the hiring process because of prejudiced thinking and lack of respect for fairness or equal opportunity.

The project “GO 50 GO” was founded by the head of the recruitment agency FALA s.r.o., Ing. Lada Vávrová. The initial impulse was given by the fact that among the clients of the recruitment agency, a raising number of long-term unemployed qualified professionals older than 50 years old was noticed. The underlying idea of the project “GO 50 GO” is to mediate contacts and meetings between heads of HR departments and older job applicants. The aim of this project is to facilitate contact between both sides and create a dialogue that would contribute to establishing equal conditions for all age groups looking for employment. An important part of the project consists in working with the target group of older job applicants to improve their skills as well as to help them keeping a strong motivation. One of the underlying aims of this project is to extend the working lives of older qualified workers and prevent early retirement.

The project “GO 50 GO” is currently running without any financial donations or support. The only activity which is funded is the annual conference: various companies fund the provision of venues, the organisation and the facilities for this occasion. Members and clients of the project “GO 50 GO” pay a fixed price of 200 CZK (approximately € 7,50) per course, which covers the cost of the lectures in terms of facilities, supplies and sometimes the lecturer’s remuneration.

In addition, the project is based purely on voluntary work. The main costs and investments are covered by FALA s.r.o. However, such investments have minimal prospect of return in terms of money.

### **Best practice example 2: Transferability**

The transferability of the project “GO 50 GO” within the Czech Republic has been confirmed as the project has been extended to Brno where it is beginning to operate under the management of another organisation, with the advisory support from the creators in Prague.

There are no perceived obstacles in terms of transferability of this project to other countries. Whilst there is a recognised target group as well as motivated providers and mediators, the relations among unemployed older workers and employers or recruiters can be mediated in informal or even formal conditions without further obstacles.

The sustainability of the project “GO 50 GO” is problematic due to the fact that it is based on volunteering from FALA staff. The project is constantly endangered by financial instability and motivation decrease among the staff. Therefore, support from structural incentives should be strengthened in order to increase the expected results. Such support should not be only immaterial in the form of a patronage but also material in terms of financing.

To increase the impact of the project “GO 50 GO”, a further and stronger effort is recommended in mediating the relations between the target group of unemployed older professionals and the employers/HR representatives. This recommendation bears in mind that the building of relationships between these two parties - which is a key aspect of the project “GO 50 GO” - needs sufficient time and space to be internalised and fully embraced among all the beneficiaries of the project.

Lastly - and this would be the priority recommendation - finding financial stability should be the paramount of all efforts for the project “GO 50 GO”, since it is an indispensable factor allowing the project to keep on developing and thus, creating a valuable and identifiable impact for its beneficiaries.

The solution proposed by the “GO 50 GO” project - based on voluntary work - is unique and seems to strengthen the motivation of all the parties involved. The involvement of the target group in creating the content of the project “GO 50 GO” is also an important driving force that stimulates the active approach.

The key strength of the project “GO 50 GO” is a highly motivated and driven staff among FALA’s personnel as well as among the other parties involved. The individual recognition of the problem and the motivation to finding solutions contribute to creating an environment in which this project can run effectively.

Extensive experience in HR and recruitment among project representatives is considered a great advantage for managing the project in a way that brings results.

The specification of the target group according to its level of education simplifies the selection of programme participants as well as the creation of adapted trainings and courses. The beneficiaries of the project have a similar level of knowledge and experience, therefore the topics covered in the provided courses and lectures apply to the majority of them.

The project “GO 50 GO” regards a topic that is approachable by a wide public as it is personally and structurally important to the society as a whole. This creates an opportunity for the development of the project. The project positively contributes to the goal of longer working lives.

The project “GO 50 GO” has good media coverage and an efficient PR strategy mainly at the occasion of the annual conference. Articles, interviews and other news have been featured on national and commercial television programmes, newspapers and social media.

The patronage from the Ministry of Labour and Social Affairs gives credibility to the project “GO 50 GO”. Recognition of the importance and impact of the project by official political entities as well as their representatives brings attention to the project and the solutions it implements.

The main weakness of the project “GO 50 GO” is the lack of financial stability that undermines not only the development of the project itself but also decreases the motivation of the project’s providers and organisers.

The financial instability and unsustainability of the project limits its reach and impact on the target group. This weakens the influence of the project in the scope of other suggested solutions for this issue.

### **Best practice example 2: Innovation**

As pointed out in the chapter above (‘transferability’), the solution is considered to be unique.

### **Best practice example 3: Confindustria Veneto SIAV S.P.A., Italy**

#### **Best practice example 3: Description**

The economic crises led to the early exit from the labour market of several categories of workers, including older managers. Confindustria Veneto SIAV, in collaboration with 'Manageritalia' (one of the largest professional associations of Italian managers), raised the issue of their involuntary exclusion from the labour market and the linked loss of their competencies for the SMEs in the Veneto region. Through the project called "Network management", the two organisations wanted to intervene on this issue by creating a network of older managers to the aim of encouraging future work collaborations between them. They have also developed a training and professional upgrading programme involving 150 older unemployed managers (over 50), in order to provide them with new job opportunities. The programme included skills assessment, counselling and situational checks. The first results of the project was the awareness for the managers of not being alone and of sharing rather often the same problems with their peers. Then, the networking resulted in the collaboration between the managers not only to improve their skills according to their past experiences but also to create joint collaborations on future projects. Finally, the training and professional upgrade with the cooperation of company experts and academics with strong links with the industrial context led to reconversion and new jobs, some of them in innovative energy firms. Other managers have been involved in consulting activities at the "Vega park incubator" (<http://www.vegapark.ve.it/incubatore>), to analyse the business plan of 20 start-ups. Their possible participation in the management and development of start-ups is currently being assessed.

An indirect result of the project lies in the strong ties that these managers have developed with the Confindustria Veneto SIAV's staff, according to one of the persons interviewed. That person assessed this experience as one of the most touching and strongest experiences at the personal/human level.

### **Best practice example 3: Implementation**

See 'Description'.

### **Best practice example 3: Transferability**

The implementation of the project is based on well-known tools of human resources management and vocational training such as situational checks, skills assessment, counselling, skills upgrading and networking. It is therefore highly transferable to other contexts. However, the success of such initiatives also depends on the capacity of the promoters to involve the right partners (company experts and academics) with strong links with the industrial context in the training, in order to create a network of both older workers in the labour market and older unemployed adults, that can further lead to new job opportunities.

### **Best practice example 3: Innovation**

The initiative involving older managers was implemented first of all in order to avoid their social exclusion and to create a network of people facing the same situation, through counselling and an upgrade of their competences.

If not innovative per se, the project led to the employment in innovative sectors of managers coming from traditional sectors (i.e. reconversion in innovative sectors) and the collaboration of start-ups with older workers.

### **Best practice example 4: Speeddates, the Netherlands**

Speeddates (*Speeddaten*) are events that bring together jobseekers and companies. It is an innovative idea that aims at creating chances for unemployed groups that are often confronted with preconception when presenting themselves to potential employers and are thrown into a situation they are not used to. Various stakeholders have taken up the idea of the speeddates. The case study focuses on two organisers of speeddates: the public employment service (*Uitvoeringsinstituut Werknemersverzekeringen, UWV*) and the social service agency in the region Oost Achterhoek. It illustrates how speeddates can be organised on a large scale but also how the idea can be transferred to other countries, regions and sectors on a smaller scale.

### **Best practice example 4: Description**

The organisation of both service providers is relatively different. Servicepunt Flex is a nationwide platform that organises speeddates in different Dutch labour market regions. The events are organised for jobseekers registered at the public employment service and private employment agencies. The initiative is based on a public-private-partnership that aims at helping the unemployed persons back into the labour market as soon as possible. The speeddates can be organised for jobseekers in general but are more and more targeted on specific sectors or target groups. One target group are jobseekers aged 55 or older. The initiative by the social service is relatively new. Only one speeddate has been organised so far. The social service focuses on long-term unemployed aged 50 or older. Prior to the speeddate, a training programme is provided that helps the older jobseekers to gain self-confidence and to prepare for the application process. Different from the speeddates organised by Servicepunt Flex, jobseekers meet employers rather than representatives from private employment agencies (PREAS).

Beside their differences, both initiatives build on regional cooperation and take into account regional labour market characteristics. Both furthermore try to match jobseekers and employers. Especially the social service gets in contact with the employer and informs them about the initiative. The public employment service plans events based on the needs of the private employment agencies.

#### **Best practice example 4: Implementation**

The initial process - first meetings and speeddates as well as an evaluation - was funded by UWV (the Dutch public employment agency). The meetings and evaluation have been useful to motivate agencies to participate but also to further develop the concept of the speeddates. The funding for the service platform Servicepunt Flex is provided in equal shares from UWV and STOFF (the Foundation for Education and Development of the private employment agencies). Thus, the private-public partnership goes beyond thematically issues and the implementation of a shared organisation helped to further manifest the cooperation.

The social service is responsible for three cities. The unemployment offices of these three cities have decided to provide funding for the initiative. Two employees of the social service office came up with the idea and convinced the board to provide funding for it. In order to be successful, it needs a management that is open to new ideas and a management structure that allows client managers - who have more personal contact with the clients - to propose and implement new ideas.

In both cases, a specific part of the budget is earmarked for initiatives that target older unemployed. This provides the means to organise events for this target group.

Implementation in the case of UWV: In the initial phase, UWV invited every job seeker to attend a speeddate within 6 weeks after becoming unemployed. The aim was to give everyone the same chances. However, due to the obligation to participate, agencies complained that many jobseekers showed up unmotivated. In addition, PREAS often did not find matching jobseekers for their sector and companies. Based on an evaluation in 2012, speeddates became an opportunity and choice rather than a forced measure by the PES. Jobseekers that receive an invitation can decide themselves whether to attend the event or not. Secondly, not every jobseeker is automatically invited any longer but the PES selects suitable applicants. A third step that originated from the evaluation was the introduction of more targeted speeddates. They are now organised for specific sectors, regions, education groups and age groups.

Implementation in the case of the social service: In principle, long-term job seekers at the social services are not obliged to participate in the training or the speeddates. It is a service that is provided to those interested in it. The client managers make sure that the 50plusers are prepared and motivated to attend. This is not only important to make it a positive experience for the job seekers themselves but also for the initiative as such. If employers feel that the job seekers do not really want a job, they might not be willing to participate in the speeddate the next time and may also feel confirmed in their prejudice concerning older worker. Thus, only those that perform well in the rehearsal are allowed to attend the speeddate.

Regular evaluations seem to be useful in order to improve the concept and to signal to important stakeholders that their opinion is taken seriously. The evaluations of UWV have helped to sustain the speeddates and to improve satisfaction among participation private employment agencies. The initiative only works if employers or private employment agencies

are willing to participate. Evaluations are one mean to stay in contact and to value them. Similarly important is the personal contact and the trust in the institutions organising the events. Building up trust is important and needs to be worked on continuously. In that sense, the regional focus helps the social service providers to use their long-standing networks and collaborations.

#### **Best practice example 4: Transferability**

The two cases show that speeddates can be organized quite differently. Transferability depends on the setting and the scale of the initiative. The speeddates organized by the social service can easily be transferred to other countries and also initiated for other target groups. However, it is crucial to either build the initiative on already existing relationships with potential employers or to start building up such relationships. Depending on the scope and nature of already existing networks, the organization of speeddates can range from a relatively uncomplicated and fast implementation to an initiative that needs more preparatory work. The collaboration of the public employment service and private employment agencies is relatively common in the Netherlands and builds on a long-standing relationship. This might not be the case in other countries, which makes it more difficult to build up a similar public-private-partnership. However, the speeddates can be organized for different stakeholders. Initiatives in other countries can adapt the concept to their own networks and partners. Also within the social service, it has been shown that already existing collaborations with potential employers are very useful. The public employment services in many countries link jobseekers and employers. This is a good foundation for the implementation of the speeddates.

The regional focus is an inherent part of the way support is organised in the Netherlands. Both the labour market offices and the social service are encouraged to carry out their work relatively independently. In countries with a similar regional focus, it is easier to implement pilot events in some regions and use the experience of these events for other regions as well. Transferability might require more effort in countries where initiatives are typically rolled out nationwide.

#### **Best practice example 4: Innovation**

Speeddates are an innovative and relatively simple tool to help older jobseekers to find a job. The selected jobseekers and potential employers or private employment agencies meet and get the opportunity to get to know each other. The direct contact clearly provides an opportunity to change employers' selection. Even if the jobseekers do not receive a concrete job offer. The participation in the speeddate offers the possibility to practise job interviews in a less formal setting. Thus, it can help to reduce anxiety and fear about interviews.

However, both cases also show that additional support and information is needed for the jobseekers to be ready for the application process and to give a good first impression. The training programme provided by the social service builds up the self-confidence of the 50plusers and provides guiding to them. Less support is provided by UWV. As a result,

evaluations show that jobseekers often showed up uninformed and unprepared to the speeddates (Kooijman & Huitenga, 2013; Oosterwaal et al. 2011). This always bears the risk that potential employers do not register for future events and that prejudice towards older worker deepens. Rehearsal events one or two weeks prior to the speeddates – similar to the one organised by the social service – seem to be a good and relatively simple idea to prepare the jobseekers.

One crucial driver of success is the openness of the management. In the case of the social service, the municipality gives space to innovative ideas initiated by the staff. This also motivates the staff to come up with new ideas.

One recommendation for both cases is to share their experiences. Better communication and exchange of ideas between different service providers can help to transfer but also to sustain the innovative initiatives. It would help other service providers to implement speeddates with less effort by using the experience of already implemented initiatives. It would also help UWV and the social service in Oost Achterhoek to further improve their initiatives.

## **8 Self-employment**

### **Best practice example 1: Stowarzyszenie “Radomskie Centrum Przedsiębiorczości” (RCP), Poland.**

The RCP is an independent association acting in elderly-friendly policies at internal and external level.

#### **Best practice example 1: Description**

The association acts in different ways: it provides help to people wishing to set up a business; it provides information and knowledge on the topics of entrepreneurship, business creation and free trade economy through the organisation of trainings; it organises informative and promotional campaigns towards entrepreneurship and economic development; it encourages potential entrepreneurs to focus on underexploited economic fields in order to support sustainability and variety of the economic landscape.

The RCP also provides training and financial services in the form of microloans for small and medium-size enterprises as well as individuals wishing to create a business, and public institutions. The RCP acts under its own potential and existing local, regional and national institutions. The RCP actively supports local initiatives aiming at creating new job positions through an incubator for entrepreneurship.

#### **Best practice example 1: Implementation**

The RCP collaborates with national and international institutions whose organisational and financial help contributes to the economic development of the region. It also collaborates with other NGOs, labour market entities and organisations, institutions focusing on social help and inclusion, local governments, national administration as well as research institutes and universities. The RCP is a member of the national network of entities working on the promotion of entrepreneurship in Poland (KSU), which works under the patronage of the Polish Agency for the development of entrepreneurship (PARP).

The reason for implementing these programmes and initiatives is a strong interest for active ageing and especially longer working lives and labour market activity for people over 50, since the city of Radom suffers from 25% of unemployment.

#### **Best practice example 1: Transferability**

Given the positive outcomes of the initiative, the initiative lead by the RCP to provide support for older people in their project of business creation is transferable to other organisations dealing with this kind of activities (incubators for entrepreneurship, job centres, or business schools). By focusing on older professionals, these organisations contribute to boosting the

employment of this particular target group. Moreover, this initiative is also transferable in other countries, in which entrepreneurship is popular.

### **Best practice example 1: Innovation**

Encouraging the elderly to be self-employed is one solution contributing to the development of the silver economy and would be one solution to the unemployment of older people. By creating their own business, the elderly would have the opportunity to extend their working lives, while working flexible hours and days, and even creating employment for other people in the case that they hire workforce. Thus, the initiative of the RCP to support older people in self-employment and in the creation of their own business is innovative and a best practice.

### **Best practice example 2: CZ**

#### **Sdružení pro vzdělávání komunit [Association for education of communities]**

**Czech Republic**

**Project: Podnikáme SPOLU (We do business TOGETHER, WdBT)**

### **Best practice example 2: Description**

The description can be seen in the chapter 'Unemployment'.

Target groups:

The main target groups were unemployed women, single fathers, unemployed people over 50 and unemployed young mothers, women returning to the labour market after maternity leave and residing in the region of Ústí nad Labem. However, no men did apply for the project, so the group of beneficiaries consisted only of female participants. No criteria such as education or qualification were given.

The target groups were defined in the call under the HROP (Human Resources and Employment Operational Programme), but the selection was made following previous experiences of the project management with similar target groups. The idea to underline intergenerational exchange between the project's participants turned out to be one of the main assets among the project's outcomes.

The potential participants were recruited among job seekers via the local Job office and among the participants of previous projects. The educational activities were held in two cycles and 20 people participated in it on average.

(1) Organisation of training modules:

The educational programme consisted of the following training modules: social and communication skills, computer skills, business law, business plan creation, marketing and public relations. These modules took the form of standard teaching hours with the combination of lectures and practical exercises. At the end, there was either a test or an interview including practical exercises. Successful participants received a certificate.

(2) Consultations with coaches and specialists in PR, marketing and advertising:

The participants had the opportunity to consult individually with experts in marketing, PR, advertising, self-presentation, etc., in the context of business creation. Moreover, the modules included more general topics such as self-presentation at job interviews, which included a video-training with a model situation presenting analysis, recommendations, and expert advice.

The participants benefited from personal consultations with coaches analysing both their social situation and work situation. These consultations implied the development of an action plan including practical elements such as a particular training on short-term employment, assessment of suitable job offers, help with the writing of curriculum vitae, assistance in solving social issues linked with unemployment, etc. In some cases, contact between participants and employers was facilitated.

(3) Establishing a co-working centre – pilot project, including three new job positions filled by the project's participants.

(4) Awareness raising and educational activities related to the concept of co-working, intergenerational solidarity, work/life balance including a conference, various publications, and two public lectures.

### **Best practice example 2: Implementation**

In the context of structurally disadvantaged regions with high unemployment rates, these groups of workers – i.e. older workers and parents after parental leave – are at higher risk of (long term) unemployment, since the sum of elements such as lower education and qualifications or gender accentuate the vulnerability of those two specific social groups.

The project “We do business TOGETHER” was primarily designed to overcome these inequalities. It was a two-year project, implemented in the Usti region, especially in Ústí nad Labem city, and consisted in the following major activities: selection of the participants, education/trainings, individual consultations, starting up a co-working centre (pilot) and awareness raising actions related to both intergenerational dialogue and to the concept of co-working.

The project “We do business TOGETHER” (WdBT) was realised under the project call within the European Social Fund – The Human Resources and Employment Operational Programme (HROP).

### Driving forces:

The main driving forces were firstly the need for a region recognised by both the HROP call and the AEC (Association for education of communities) is an institution answering the call, and second, the need to find a suitable source of income as well as motivated participants (see the above-mentioned low motivation of job seekers to devote their time to activities not directly connected to job acquisition).

At individual level, the project's management and institutional background (availability of the project's management office) could be seen as a key, building on the willingness to invest time and energy to job seeking groups in difficult structural conditions.

The key individuals consisted in the project manager, the personal consultant, the lecturers (especially those lecturing in law and marketing who provided very practical, accessible and comprehensive knowledge).

From the side of the participants, the importance of further education as a part of being/staying involved, which, in turn, may help to provide job opportunities was stressed, as well as the new friendships gained with this experience ("they still meet for a cup of coffee every week or so").

### Supporting structures (e.g. municipal structures, collective agreement, legislation):

The project was mainly supported by the regional Job office and by the selected employers who were ready to open practical training for the project participants.

### Financing:

All the financial expenses were covered by EU funds. There is no direct way of measuring the efficiency of the invested funds, since the project had the aim of improving employability, functional literacy and other types of skills, which may have mid- to long term return periods. The outcomes of the project - the improvement of age relations within the society, the empowerment of disadvantaged groups and the mutual support among the participants maintained after the project's completion - are difficult to assess.

## **Best practice example 2: Transferability**

The key strength of the approach is the purposefully multigenerational design, included both in the theoretical teaching provided within the courses, and the cooperative models participants were engaged in. The collective engagement of the participants was clearly one of the strengths of the project. The lecturers have provided basic expert knowledge, but the participants were mutually teaching each other the lessons learned from their own experiences.

Opportunities may mainly lie in overcoming the time restriction of the project. There is a non-formal contact among the selected groups of participants and the project office, which supplements the services of the Job office in provision of job offers and new openings. As the project office staff gets to know the project participants very well during the courses and trainings, they can also help them to connect with the best-suited employer or suggest a business opportunity. If start-up capital would be provided as a part of the project - at least for the most successful and motivated participants - the number of job opportunities provided could be higher.

The project design could serve as a tool for building up an intergenerational understanding in the society on one hand, and as a source of new services and job opportunities on the other, since the intergenerational teams are actively searching for gaps on the market which would correspond to their interests and capabilities and could be brought to life as business opportunities.

### **Weaknesses:**

The time-constrained frame of the project means there are no direct follow-up actions aiming at supporting or coaching the participants after the project's completion. Therefore, the results are that a) information on the actual positive effects of the project is unavailable (information on how many women started their business or found a job is limited); and more importantly b) the participants' potential nurtured within the project may diminish if not guided, before the actual job acquisition or business creation. As the target groups are defined as those who have experienced difficulties on the labour market, and since education and training may not be sufficient in overcoming these disadvantages, the lack of follow-up support diminishes the overall project's efficiency.

The project aimed at motivating the participants to return to the labour market by choosing professional activities such as self-employment, even though this particular goal was not reached. Indeed, participants did not succeed to overcome their fear of failure often linked with starting a business. The participants expressed their concerns regarding the risks related to starting a business at old age, and explained their preference for the simplest kinds of jobs that would help them to fill their time until retirement.

The low willingness within the target group to take business-related risks could be stated among the biggest threats. It is usually based on previous negative experiences, including multiple periods of unemployment, and the need to have secure income, especially in the periods before entitlement to old-age pension.

Professional competence (vocational training): There was a significant interest from the participants in training regarding socio-professional fields such as social work, beauty and cosmetics. The problem was, however, the narrow range of courses in the region preventing all interested participants to attend preferred training courses.

At the end of the business-plan building courses, many of the participants were satisfied with the proposal, but were discouraged by the expectations, stating that “bank will not grant them a credit”.

A part of the participants has acquired new employment directly in relation to their involvement in the project (e.g. prolongation of the short-term contracts used previously only for the purpose of acquiring a new experience with the employer) or as a result of the cooperation between consultants and employers. In other cases, the benefits of the project are more indirect and include an improvement of communication skills, empowerment, knowledge, social network enhancement etc., which could lead to the acquisition of new employment in the future. New knowledge acquired by the participants arrived by the channels of educational courses, up-skilling and re-training, individual counselling as well as new practical skills obtained through trainings with the employers. The social aspects of the project are one of the objectives achieved to the highest degree, due to support both from the side of the project managers (such as the above-mentioned individual counselling), and among the participants.

### **Best practice example 2: Innovation**

This project was aiming at age heterogeneity of the participants, which is often not the case in this type of projects. The target groups are often defined by chronological age, both directly or indirectly, building upon expectation of common needs and issues defined solely by the age-group membership or by the position within the lifecycle. As an unintended consequence many initiatives support the age segregation in the society, which is believed to be one of the sources of ageism in the society. That in turn affects the position of older people on the labour market. By overcoming the age segregation, this approach brought an innovative principle of mutual reinforcement of two generational and age groups, and by departure from “classic” intergenerational approach build on one way interventions, here were both groups equally engaged in the partnership around common topic, enhancing both employability and generational intelligence.

## **Best practice example 3: Polska Agencja Rozwoju Przedsiębiorczości (PARP), Poland**

### **Best practice example 3: Description**

PARP realises a programme dedicated to start-ups and including an incubator for entrepreneurship, which aims at supporting entrepreneurs in the development of their newly established companies and through the provision of assistance in management. Among the beneficiaries of this programme, there are numerous people over the age of 50. In the framework of the incubator, the beneficiaries receive moral and financial support as well as mentoring in the context of financial analysis, management, marketing, and opportunities of funding. PARP trains these entrepreneurs in a way for them to be autonomous and handle the further development of their business on their own.

In its collaboration with numerous entities from the business, economic and academic sectors, PARP creates panel experts' meetings which analyse and discuss various issues linked with entrepreneurship development. These experts' panels produce recommendations and propositions for change, which are proposed to the collaborating companies to create a further improvement of policies in various topics. This system of building on a common reflection states the transferability and further development of PARP's ideas.

### **Best practice example 3: Implementation**

For implementation see PARP in the chapter LifeLong Learning (example 6).

### **Best practice example 3: Transferability**

PARP's measures aimed at business creation of the elderly have positive outcomes. Hence, providing support for older people in their project of business creation is transferable to other organisations dealing with this kind of activities (incubators for entrepreneurship, job centres, or business schools). By focusing on older professionals, these organisations contribute to boosting the employment of this particular target group. Moreover, this initiative is also transferable in other countries, in which entrepreneurship is popular.

### **Best practice example 3: Innovation**

Encouraging the elderly to be self-employed is one solution contributing to the development of the silver economy and would be one solution to the unemployment of older people. By creating their own business, the elderly would have the opportunity to extend their working lives, while working flexible hours and days, and even creating employment for other people in the case that they hire workforce. Thus, the initiative of PARP to support older people in

being self-employed and starting their own business is innovative and an example of best practice.

## 9 Awareness Campaigns

### Best practice example 1: Confindustria Veneto SIAV S.P.A., Italy

#### Best practice example 1: Description

Confindustria Veneto SIAV has promoted and has participated in a number of focus groups on the issue of ageing in the workplace, in Veneto.

One of them took place on March 2012 and focused on “Ageing and the labour market”. It was attended by stakeholders of the labour market (employers, trade unions, Veneto Region, universities and research centres, chambers of commerce, training agencies, consulting companies, etc.). The idea was to raise awareness on the consequences of the extension of working lives and the need to promote age management. The various stakeholders have provided in that occasion a wide range of evidence on the future employment of young and older people, and made proposals regarding initiatives to be taken in the field of Lifelong Learning, that are reported hereafter.

In the past, economic crises were faced with companies’ restructuring projects, encouraging early voluntary retirement, which anticipated and thus solved the problem of possible redundancies. This possibility is no longer viable, both for objective reasons (financial sustainability of the pension system that imposes new welfare policies), and subjective reasons, since older workers who prematurely exit the labour market ask to join it again (they feel their work potential is intact and they are in good health). According to Confindustria Veneto SIAV, it is then necessary to build new scenarios in a “regenerative” perspective, whose components are summarised as follows:

- to analyse local contexts and their economic specificities to enhance the cultural, technical and professional heritage accumulated over time (crafts, small businesses, manual creativity, production niches etc.), paying attention to integrate this heritage with new technologies, in order to combine continuity with innovation;
- to recognise the limits of the growth of the manufacturing sector and to analyse the potential growth of the provision of services for businesses and people;
- to respond to the economic crisis not only with manoeuvres regarding the supply side, but also the demand side, with new businesses and new markets, promoting and implementing active labour market policies, including those to the benefit of older workers;
- to analyse changes concerning the system of needs, especially those related to ageing;
- to prevent discrimination based on gender and age;
- to recognise the specific issues of older workers (e.g. in the treatment of redundancies, through the reintegration in case of premature exit, in terms of mobility management etc.) as objects of active policies, organically managed by structures and organisations that are well-defined, and not as a consequence of individual strategies;
- to evaluate and enhance the experience of older workers even in the relationship with the younger generations of workers.

In order to be effective, the proposals will require the collaboration of all stakeholders involved at different levels: the institutions (as policy makers), the educational system, the economic system and the civil society (as actor of peaceful coexistence and social cohesion).

The outcomes of the focus group called thus for an organic response to the needs of quantitative and qualitative knowledge and to build and implement the solutions proposed regarding the issue of ageing in the workplace in the Veneto Region.

Through this process, Confindustria Veneto SIAV wants to answer to one important question: how to combine longer working lives with the issue of innovation and productivity within companies? And even though Confindustria Veneto SIAV has developed tools regarding age management and intergenerational cooperation it cannot answer to that question alone. Indeed, its strategy for promoting work in older age based on:

- 1) what to transfer (i.e. codification of knowledge – expertise, values, etc.)
- 2) how to transfer it (i.e. the modality – focus group, team work, intergenerational cooperation, etc.)
- 3) an accurate evaluation of the costs of such transfer (project financing) and
- 4) the monitoring of the outcomes in numerical terms in order to check the impact of this strategy.

Since these actions can only give the best results if all stakeholders agree on an economic development strategy for the region, Confindustria Veneto SIAV also keeps on bringing the issue of supporting the older workforce to all the round tables it participates in, and is also intended to influence the regional economic planning by reiterating the need for a solution that enhances age management in companies in a systemic organic perspective.

Confindustria Veneto SIAV is also determined to pursue awareness campaigns inside the firms. Indeed, during a recent initiative involving 20 enterprises, Confindustria Veneto SIAV found evidence that firms, especially high-tech ones, seldom consider age management of the workforce as an issue. A few good practices on intergenerational collaboration were nevertheless found in this sector.

### **Best practice example 1: Implementation**

See 'Description'.

### **Best practice example 1: Transferability**

Confindustria Veneto SIAV's activities and initiatives underline that extending working lives is possible only by focusing on human capital. Awareness campaigns are first and foremost

necessary inside and outside the firm in order to represent older workers as a resource for the enterprise rather than a less productive factor. These campaigns are easily transferable. Older workers are indeed a resource because not only they possess a thorough knowledge of the production processes but they also share the value and the history of a firm. Stereotypes concerning older workers should therefore be removed along with an adjustment inside the firm implying the acknowledgment of the necessity of a transfer of knowledge both from and to older workers. This accumulation of human capital is crucial for the competitiveness of the enterprises and this is a challenge that needs considering employees of all ages, from the younger to the older ones.

This is why Confindustria Veneto SIAV's implements awareness campaigns at two levels. The first is the level of the firms. Raising awareness on the ageing workforce and spreading at the same time the word on existing solutions of age management is surely a way to change the mentality inside the firm, and to enhance the older workforce. Any institution or organisation that is rooted in the territory can contact firms and organize awareness campaigns.

The second level is more institutional, and, in order to be implemented elsewhere, requires contacts with all stakeholders.

### **Best practice example 1: Innovation**

Removing stereotypes about older workers is a difficult process involving various stakeholders. By directly involving firms, this process is monitored and facilitated, to the benefit of both the firms and older workers.

## **10 Recruitment / labour demand**

### **Best practice example 1: Sozial-Holding der Stadt Mönchengladbach GmbH, Germany**

#### **Best practice example 1: Description**

Sozial-Holding is encouraging older candidates to apply. Hence, the share of employees over 50 years is over 40% and therefore higher than in other companies. Recruitment of qualified new employees is difficult but until now a sufficient amount of applications could be achieved. It is easier to recruit low qualified employees since supply of low-qualified labour is high in this sector, while qualified labour is scarce.

#### **Best practice example 1: Implementation**

See 'Description'.

#### **Best practice example 1: Transferability**

Recruitment of older candidates is transferable to circumstances where older applicants are available (i.e. in occupations where job changes are frequent). Older applicants' wage expectations could pose a problem to transferability; also, in occupation with very long settling-in periods employers could be reluctant to hire older workers since time between the end of the settling-in period and retirement (or partial retirement) could be too short.

#### **Best practice example 1: Innovation**

Recruitment (partially targeted) of older workers is not innovative in itself, yet rather uncommon.

### **Best practice example 2: Queen Alexandra College, UK**

#### **Best practice example 2: Description**

QAC operates an entirely age-neutral recruitment process. A significant part of this is arguably QAC's decision to conduct health assessments and individual risk assessments post offer of employment. Accordingly making reasonable adjustments for new recruits is engrained in their day to day process.

## **Best practice example 3: Asda Stores Limited, UK**

### **Best practice example 3: Description**

#### **Age Neutral Recruitment**

As an Equal Opportunities Employer Asda operates an entirely age neutral recruitment process. This ensures that all recruitment is carried out in a fair, objective and non-discriminatory way. As part of this Asda does not ask any health or absence questions in interviews other than those which there is a fundamental part of the role they cannot carry out due to the health risks. If applicants for these roles identify a potential health issue they are referred to Occupational Health who will identify how Asda can make reasonable adjustments, or whether there are opportunities for the candidate to be considered for alternative positions within the business.

In line with the Equality Act 2010, Asda makes reasonable adjustments as to not prevent disabled candidates from being disadvantaged. When making these reasonable adjustments the candidate is always consulted, and consultation is taken with the candidate's GP, support workers, one of Asda's disability partners, and/or occupational health. Furthermore Asda also requires candidates to complete an Employment Health Screening Record to identify any potential areas where reasonable adjustment can be made during their application.

As an Equal Opportunities employer Asda monitors recruitment by asking candidates to complete an Equal Opportunities form as part of their online application. This section of the application is not visible during recruitment and therefore cannot be used for selection purposes. However, it does enable Asda to produce Equal Opportunities reports to monitor trends.

### **Best practice example 3: Implementation**

See 'Description'.

### **Best practice example 3: Transferability**

Asda commitment to Equal Opportunities recruitment provides key benefits to older workers as it ensures that selection or promotion is based entirely on applicant's suitability for the job. This avoids any form of disadvantage older workers may face when applying for jobs, thus enabling them to extend their working lives.

### **Best practice example 3: Innovation**

In their consideration of whether there are opportunities for applicants to be considered for alternative positions within the business than those applied for, Asda presents a highly innovative and inclusive approach to recruitment. By actively seeking positions for candidates

with additional needs Asda's makes a considered effort to best support those, who otherwise may face significant disadvantage, into their workforce.

### **Best practice example 3: Polska Agencja Rozwoju Przedsiębiorczości (PARP), Poland**

#### **Best practice example 3: Description**

At internal level, since the average age of PARP employees is 38 years old, and since no difference between the productivity of younger people and the one of older people has been found in any of the Agency's reports, the latter does not implement any specific HR policies for employees aged 50+. Therefore, the HR management policies are developed around the idea of equality of treatment between PARP's employees.

However, PARP also takes into account the findings of its reports regarding the employment of people over 50 and adapts its recruitment processes accordingly. The Agency is well aware of the advantages of hiring people belonging in this age group – for example stability and experience – and aware of the stakes of active ageing in an economic perspective.

Further, PARP is strongly engaged in the promotion of employment activation for people over the age of 50 and organises free webinars and conferences destined to HR managers, entrepreneurs and business owners which aim at encouraging them to hire people over 50 years old and creating elderly-friendly policies.

#### **Best practice example 3: Implementation**

See 'Description'.

#### **Best practice example 3: Implementation**

Even though PARP does not implement HR policies specially targeting older workers, the organisation is aware of the stakes of extending working lives. Hence, it organises HR seminars addressed to recruiters, head-hunters, CEOs, and HR managers aiming at raising awareness about the benefits of hiring older professionals.

#### **Best practice example 3: Transferability**

The outcomes of the initiative are not known, since we do not know how many HR managers and head-hunters actually hired older professionals. However, raising awareness campaigns and trainings are always a positive means to sensitize people to crucial issues and providing those trainings would be easily transferable to other companies and organisations, as well as other countries.

**Best practice example 3: Innovation**

The innovative aspect of the initiative resides in the fact that the measures taken by PARP are useful to create other policies toward the extension of working lives for the elderly.

**Best practice example 4: Hero, Spain**

See page 97-98 for Hero's recruitment policies.

## 11 References

### 11.1 MoPAct | WP3 | Task 3 | Case Studies

Barslund, M. (2015): ServiceTeam Nyborg (DK)

Bauknecht, J./Bössing, C. (2015): InfraLeuna (DE)

Bössing, C./Bauknecht, J.(2015): Reconciliation of gainful employment and elderly care in German companies/organisations (DE).

Gasior, K./ Zólyomi, E. (2015): Speeddates to bring older job seekers and employers face-to-face (NL)

Hudson-Sharp, N. (2015): Queen Alexandra College (UK)

Hudson-Sharp, N. (2015): North Warwickshire Borough Council (UK)

Hudson-Sharp, N. (2015): Asda Stores Limited (UK)

Khýrová, V. (2015): GO50GO (CZ)

Linnenschmidt, K. (2015): Sozial-Holding (DE)

Martellucci, E. (2015): Cevora (BE)

Martellucci, E. (2015): Experience@Work (BE)

Moskvina, J. (2015): Elis (LT)

Krumina, M. (2015): Rimi (LV)

Osila, L. (2015): Eesti Energia (EE)

Ríncon-Aznar, A. (2015): Femeval (ES)

Ríncon-Aznar, A. (2015): Hero (ES)

Romanini, A/Socci, M. (2015): Confindustria Veneto SIAV (IT)

Socci, M. (2015): UniCredit (IT)

Vidovičová, L. (2015): We do business TOGETHER (CZ).

Zólyomi, E./Gasior, K. (2015): Experience certificate for recognition of prior skills and competences (NL)

Zólyomi, E./Gasior, K. (2015): The interactive digital portal to enhance sustainable employability (NL)

## 11.2 Other references

AE (2011). Hvem går på efterløn som 60 eller 61-årig? Analyse, Arbejderbevægelsens Erhvervsråd. Available here: <http://www.ae.dk/analyser/hvem-gaar-paa-efterloen-som-60-eller-61-aarige>

Barslund, M. (2015a). Extending working lives: the case of Denmark. MoPact working paper. Available here: <http://www.ceps.eu/publications/extending-working-lives-case-denmark>

Barslund, M. (2015b). Improving employee retention and well-being in a low-skilled and high health risk occupation: the case of a Municipal cleaning service in Denmark.

Bauknecht, J. (2015): Unpublished project report.

Cabi (2013), "Slutmaaling – et helt arbejdsliv: ServiceTeam Nyborg". Cabi, 2013.

de Leeuw, E. (2005): To Mix or Not to Mix Data Collection Modes in Surveys. In: Journal of Official Statistics, Vol. 21, No. 2, 2005, 233-255.

DR (2013), 'Virksomhedspraktik erstatter førtidspension', Article on Danish Radio. Available here: <http://www.dr.dk/nyheder/regionale/fyn/virksomhedspraktik-erstatter-foertidspension>.

Duvekot, R. (2014). *European inventory on validation of non-formal and informal learning, 2014: Country report Netherlands*. European Commission, Cedefop, ICF International.

EC (European Commission) (2013): Guide to Social Innovation. February 2013.

EC (European Commission) (2010) Enterprise and Industry.

Fagbladet3f (2011). Trivsel halverer sygefravær. Article in Union Magazine. Available at: <http://www.fagbladet3f.dk/nyheder/d5c1fa0c7f134e11a38bf0140cfcc8fa-20110619-trivsel-halverer-sygefravaer>

FS (2012). Article in Fyens Stiftstidende, „Arbejds miljøpris gik til rengøeringsansatte“

Healthy work in an ageing Europe: An European collection of measures for promoting the health of ageing employees at the work place , Boukal, C. and O.Meggeneder (eds), 2005.

Heinze, R.G./Naegele, G. (2012): Social Innovations in Ageing Societies. In: Franz, H.-W./Hochgerner, J./Howaldt, J. (eds.), Challenge Social Innovation, Potentials for business, social entrepreneurship, welfare and civil society. Berlin: Springer, 153-167.

Hero Espana (2004) El éxito de una cultura corporativa voluntariamente asumida por dirección y trabajadores, Capital Humano No. 179, Julio-Agosto.

Hooftman, W.E., de Jong, T., & Vos, F.S.M. (2014). *Monitoring NPDI 2014: Overzicht en verdiepende analyses*. TNO rapportage.

Kenniscentrum EVC website: <http://www.kenniscentrumevc.nl/werknemers/english>

Kooijman, Femke & Huitenga, Judith (2013) Rapport evaluatie publiek private samenwerking UWV en uitzendbranche. July 2013.

Moulaert et al. (2013): The International Handbook on Social Innovation: Collective action, social learning and transdisciplinary research. Cheltenham: Elgar.

NPDI Website: <http://www.npdi.nl/>

OECD (2014). *Ageing and Employment Policies: Netherlands 2014. Working Better with Age*. OECD, Paris.

Oosterwaal, Leonie, Huitenga, Judith, Hoffer, Marit (2011) Rapport evaluatie speeddaten met uitzendbureaus op de vestigingen van het WERKbedrijf. December 2011.

O'Sullivan et al. (2010): *Innovating better ways of living in later life: Context, Examples and Opportunities*. The young foundation.

Pierson, Paul (2002): *Coping with permanent austerity: welfare state restructuring in affluent democracies*. In: *Revue française de sociologie*, Vol. 43, No. 2, L'Europe sociale en perspectives (Apr.-Jun., 2002), 369-406.

Pol, E./Ville S. (2009): *Social innovation: Buzz word or enduring term?* In: *The Journal of Socio-Economics* 38, 878-885.

ServiceTeam (2015), 'Nyt fra projekt tidlig indsats', Employee News letter for ServiceTeam Nyborg.

ServiceTeam (2015b), 'Digitalisering i ServiceTeam', ServiceTeam Nyborg internal document.

Totterdill, P./Cressey, P./Exton, R. (2012): *Social innovation at work: Workplace innovation as a social process*. In: Franz, H.-W., Hochgerner, J./Howaldt, J. (eds.): *Challenge social innovation. Potential for business, social entrepreneurship, welfare and civil society*. Berlin Heidelberg: Springer Verlag.

Vos, F.S.M. & de Jong, T. (2014). *DIX 2014*. TNO rapportage.

## 12 Appendix: Guidelines for Case Studies

### Work Package 3: Extending Working Lives

#### Guidelines for Case Studies

The aim of the case studies is to illustrate how corporate or organisational practices can contribute to extend working lives. To capture relevant information interviews will be conducted and documents analysed. Basis for the case studies are the fact sheets that were filled out in task 2 of work package 3. The interviews will be the main source of information, yet other sources (e.g. documents) can also be used. The interviews should follow the given structure (see below) and focus on these **research questions**:

- Which aspects of the initiative contribute to extend working lives?
- What were drivers and barriers to implement the initiative?
- Which prerequisites are necessary to implement the initiative in other companies, organisations or countries?

It should be clarified in advance if the company/organisation or of the interviewee wants to be treated anonymously in the case study. This concerns name, location or other information that indicates the identity of the organisation or the person. Anonymity implies a very broad description of the company/organisation's size, location (just country), business sector etc. One problem could result from published best practice cases, i.e. due to similarity in measures one could identify the respective company/organisation. Should be discussed after company's/organisation's wish for anonymity.

#### General information:

- Sources: interviews and documents provided by the organisation or found through desktop research
- From 2 or 3 up to 5 interviews per case study, 45-60 minutes per interview
- Possible interview partners: HR manager, line manager, staff representative, (older) worker
- Length: 8-10 pages plus appendix per case study (Calibri 12 pt, spacing 1,15)
- Completion by August 31, 2015 (sent via email to TUD: [jbauk@post.tu-dortmund.de](mailto:jbauk@post.tu-dortmund.de))

## Structure of case study

### 1. Executive summary

### 2. Introduction

- Information about company/organisation (e.g. name, location, size, business sector)

### 3. Description of the initiative approach

- General description of the initiative
- Initiation
  - What were the main reasons to introduce the initiative? (internal reasons, e.g. qualification adjustment and external reasons, e.g. expected labour force shortage, subsidies)
  - What were the main objectives to achieve with the initiative?
- Target group(s)
  - Older workers
  - Other (e.g. gender, older migrants, disabled workers, low-qualified workers, unemployed persons)
- Measure/initiative
  - Dimensions and quality of work (e.g. work environment, wages).
  - Values/Motivation
  - Professional Competence (vocational training)
  - Health (mental and physical health, health promotion)
  - Working time (i.e. working hours, flexible working-time arrangements, part-time arrangements), work-life balance (e.g. care of children or parents)
  - Work after retirement (“silver work”)
  - Other
- Other initiatives (e.g. informal work, civic engagement, social volunteering)
- Underlying concept (e.g. life course orientation, intergenerational solidarity)
- Specific characteristics (e.g. social inequality, regional dimensions, specific branch)
- Measures
  - Dimensions and quality of work (e.g. work environment, wages)
  - Values/Motivation
  - Professional Competence (vocational training)
  - Health (mental and physical health, health promotion)
  - Working time, work-life balance (e.g. care of children or parents)
  - Work after retirement (“silver work”)
  - Other
- Other initiatives (e.g. informal work, civic engagement, social volunteering)
- Underlying concept (e.g. life course orientation, intergenerational solidarity)

#### **4. Input**

- Driving forces (e.g. engaged employee, representatives, HR strategy)
- Supporting structures (e.g. municipal structures, collective agreement, legislation, research institutes/universities)
- Political incentives: Were any incentives used? Which political incentives would be helpful? At this point, knowledge on the interviewer's side concerning current legislation and incentives can be crucial.
- Financing
  - Funding, public and political incentives, invested costs
  - Return on investment (if measurable)

#### **5. Evaluation of the approach (based on researchers' assessment)**

- Brief SWOT evaluation
- Transferability and sustainability
- Recommendations to improve the initiative (e.g. organisational structure, subsidies, legislation)

#### **6. Conclusion**

- What can be learned through the initiative?
- Future perspective of the initiative: Outlook: Will the measure be abolished, will it be widened in order to cover more workers etc.?

#### **7. References**

**MOPACT is a four year project funded by the European Commission under the Seventh Framework Programme to provide the research and practical evidence upon which Europe can begin to make longevity an asset for social and economic development.**



To achieve this aim, MOPACT concentrates the highest possible quality of scientific analyses into the development of innovative policies and approaches that can assist public authorities and other key actors, at all levels in Europe.

MOPACT starts from the conviction that Europe requires a new paradigm of ageing if it is to respond successfully to the challenges of demographic change. Ageing is currently understood as a time of decline, frailty and dependence and policy responses to it still reflect the historical era when retirement took place for a majority at state pension ages and post-retirement years were relatively short. Changes in the labour market and social behaviour coupled with a remarkable extension in longevity have transformed the experience of later life. The boundaries of frailty are being pushed back and, for a growing number of older Europeans, 70 is the new 50.

- A multi-disciplinary team will target the key challenges of ageing:
- The continuing longevity revolution
- A shrinking and ageing labour force
- The fiscal sustainability of pensions, welfare systems and health care
- The structural lag between changes in society and subsequent changes in societal institutions and attitudes
- The rising need for long-term care
- Changing social and political roles

MOPACT brings together 29 partners from 13 countries across Europe in a unique collaboration of leading researchers to address the grand challenge of ageing.

Contact us:

*University of Sheffield*  
*Department of Sociological Studies*  
*Northumberland Road, Sheffield, S10 2TU, UK*  
*T: +44 (0)114 222 6417 F: +44 (0)114 276 8125*  
*Email: [mopact@sheffield.ac.uk](mailto:mopact@sheffield.ac.uk)*  
*Website: [www.mopact.group.shef.ac.uk](http://www.mopact.group.shef.ac.uk)*

The MOPACT project aims:

- To conduct the most comprehensive review to date of the social and economic challenges of ageing
- To collect and analyse social innovations and policy initiatives
- To map the steps required to realise active ageing in Europe and to propose innovative ways of doing so
- To involve key end-users and stakeholders, such as policy-makers, practitioners, product producers, designers and older people in all project activities
- To undertake the wide and effective knowledge transfer and dissemination of the work of MOPACT

MOPACT's core theme is focused on realising active and healthy ageing as an asset. This will be supported by eight scientific themes:

- **Economic consequences of ageing:**  
Understanding and alleviating the economic effects of population ageing
- **Extending working lives:**  
Raising the employment of older workers, aided by lifelong learning
- **Pension systems, savings and financial education:**  
Ensuring pension adequacy and pension system sustainability
- **Health and well-being:**  
Driving healthy life expectancy and the social engagement of older people
- **Biogerontology:**  
Delaying the onset of frailty, dependence and age related diseases
- **Built and technological environment:** Shaping housing, mobility, transport and ICT to support an ageing population
- **Social support and long term care:**  
Matching supply and demand for long-term care and social support
- **Enhancing active citizenship:**  
Enhancing the political participation of senior citizens and improving the capacity for adapting to societal change