



ASPA

Activating Senior Potential in Ageing Europe

D.4.2. National report: GERMANY

Report on organisational case studies



European Commission



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PART ONE: NATIONAL SUMMARY REPORT GERMANY

By Paula Aleksandrowicz, Frerich Frerichs

Companies for case studies were sampled in Germany by using national and international databases of good practices examples (predominantly, European Foundation and inqa.de), project reports, articles in magazines and newspapers and personal contacts (e.g. to members of the ASPA national advisory board). Also the database of firms which participated in the WP1 employers' survey and consented to be contacted directly was used – to no avail. Based on sampling guidelines, a balanced mix by size, sector, branch and duration of age management measures was aimed at.

On total, 31 firms were contacted by two researchers. The following firms rejected participation in the interview, either directly or indirectly by not answering to phone or mail requests (Table 1):

Table 1: Companies which rejected WP4 interview

No.	Name	Sector	Branch	Size	Reason
1	Information withheld	Private	Man. of electrical equipment	25 persons	Busy and over-researched
2	Information withheld	Private	Spec. construction activities	35	Busy at the time being
3	Information withheld	Private	Man. of electrical equipment	66	Arrangement of date difficult
4	Information withheld	Private	Man. of electrical equipment	90	Busy
5	Information withheld	Private	Man. of electrical equipment	300	Arrangement of date difficult
6	Information withheld	Private	Man. of food products	300	Restructuring
7	Information withheld	Private	Man. of textiles	320	Busy at the time being
8	Information withheld	Private	Employment activities	349	No decided age management measures
9	Information withheld	Public/private	Financial service activities	350	Busy
10	Information withheld	Private	Man. of food products	440	No information

11	Information withheld	Private	Man. of electrical equipment	490	Measures are being re-adjusted
12	Information withheld	Private	Man. of non-metallic mineral products	490	Unavailable per mail and phone
13	Information withheld	Private	Man. of machinery and equipment	500 (at site)	Too time-consuming; measures are being re-adjusted
14	Information withheld	Private	Man. of basic metals	600	Measures were suspended after change in management
15	Information withheld	Private	Man. of machinery and equipment	700	Initiative has been curtailed due to crisis; not able to involve much time due to short-working
16	Information withheld	Private	Financial service activities	3,500	Too time-consuming
17	Information withheld	Private	Man. of computer, electronic and optical products	12,000	Too time-consuming; no asset for the firm; initiators have left
18	Information withheld	Private	Warehousing and support activities for transportation	13,700	No information
19	Information withheld	Public	Employment activities	113,000	Busy, over-researched

In the final portfolio, there were 12 mostly large firms with long-term measures in the field of age management (Table 2):

Table 2: Final German case study portfolio with regard to size and duration of measures

Company size	Longitudinal cases	Additional Cases	Total
< 50 workers	3		3
50 < 250 workers	1		1
≥ 250 workers	7	1	8

The firms were approached by phone or (if unavailable) by e-mail. Contact persons were directors or persons responsible for personnel matters. The interviews usually lasted for 1.5 hours and were recorded digitally. On the basis of the recorded interview and additionally collected materials (e.g. information on the age management initiatives provided by the firm), singular case study reports were written based on WP4 guidelines binding for all partners. Those were later authorised by the interviewed firm managers. Two firms chose to stay anonymous.

Table 3 depicts the 12 cases with regard to further characteristics such as structure of the workforce, motivation for the introduction of measures, nature of social dialogue and the development of initiatives in the field of age management.

PART TWO: CASE STUDY SUMMARY TABLE

Nr.	name of organisation	exact size of Establishment	% of men, women and workers aged 50+	motivation of the firm for age management	nature of social dialogue	target group in original a. current initiative	age profile in original a. current initiative	retention or of original initiative	age management approaches*
1	KSB AG	2,000 at studied site, 4,000 Germany-wide	16% women and 30% older workers	Demands for qualified workers and their long retention, esp. against the background of demographic change; interest in maintenance of employability of workers; culture of diversity as result of internationalisation Year of introduction: 2001; longitudinal	<i>"constructive and confident"</i>	Original measure: - All workers - Qualified workers (older executives) - Parents - Persons with health problems Current initiative: - All workers - Parents - Occupational groups in fields which could be affected by personnel shortages in future	Originally, both age-specific and overarching, now focusing rather on workers of all ages	Retention	Original and current measures: - 1 - 2 - 3 - 4 - 6 - 7 - 8 - 9 - 10
2	üstra Hannover-sche Verkehrsbetriebe AG	1,900	13% women and 36% older workers	High health risks for drivers; know-how losses after massive early	Co-management of the works council, active involvement of employees in	- Drivers - Apprentices - Parents	Originally, rather overarching measures, now both age-specific and	retention	Original measures: - 3 - 6 - 7 Current initiative:

Nr.	name of organisation	exact size of Establishment	% of women and men aged 50+	motivation of the firm for age management	nature of social dialogue	target group in original a. current initiative	age profile in original a. current initiative	retention or of original initiative	age approaches* management
				retirement; end of the 'part-time retirement scheme (ATZ)' option; reduced number of work-load-reduced jobs; approaching personnel shortages Year of introduction: 1999; longitudinal	the development and implementatio of organisational changes		directed at workers of all ages		- 1 - 3 - 4 - 6 - 7 - 9 - 10
3	Kreisverwaltung Recklinghausen	1,440	56% women 34% older workers	More professional personnel management as result of the modernisation processes in German public administration; development of more demanding and qualified positions; increased work load and longer working hours; know-how	" <i>constructive and trustful</i> "; works council and workers participated in the design of age management measures	Original and current measures: - older workers - parents - all workers	Rather age-specific, but health management measures are open to everyone	Retention	Original and current measures: - 2 - 3 - 4 - 6 - 7 - 9 - 10

Nr.	name of organisation	exact size of Establishment	% of women and men aged 50+	motivation of the firm for age management	nature of social dialogue	target group in original a. current initiative	age profile in original a. current initiative	retention or of original initiative	age management approaches*
				losses after massive early retirement; approaching personnel shortages in management positions; health problems among older workers Year of introduction: 2005; longitudinal					
4	LOEWE AG	940 Germany-wide	38% women and 31% older workers	Increased work load after rationalisation; problems of older workers with piece work paces; reduced number of work-load-reduced jobs; demand for more qualified personnel Year of introduction: 2005; longitudinal	<i>"constructive and trustful"</i>	- pilot measure in one department with blue-collar workers - managers - older workers - all workers	Many age-specific measures and measures focusing on managers, but health management measures are open to everyone and some measures will be after completion of the pilot phase extended to	Retention	Original measures: - 1 - 3 - 4 - 6 - 7 Current initiative (in extension to the above): - 2

Nr.	name of organisation	exact size of Establishment	% of women and men aged 50+	motivation of the firm for age management	nature of social dialogue	target group in original a. current initiative	age profile in original a. current initiative	retention or of original initiative	age approaches* management
							other departments		
5	Bitburger Braugruppe	1,683 (group-wide)	20.1% women 35.1% older workers	Participation-oriented culture Striving to be a 'good employer' and retaining qualified and motivated workers Securing employability in times of curtailment of early retirement opportunities Need for long-term-oriented personnel policy in order to stay competitive Approaching personnel shortages Year of introduction: 2007	"constructive and trustful"	- qualified workers - persons with health problems	- age-specific - overarching	Retention	- 2 - 3 - 6 - 7 - 9
6	Anton Plenkens	6	0% women	Participation in a Germany-	(no works	- workers above the age	- age-specific (middle-aged	Retention	- 3

Nr.	name of organisation	exact size of Establishment	% of women and workers aged 50+	men and aged	motivation of the firm for age management	nature of social dialogue	target group in original a. current initiative	age profile in original a. current initiative	retention or of original initiative	age approaches* management
	Solarteuer, Dach-decker und Klempnermeister		17% older workers (1 person = owner)		wide project Retaining experienced workers Qualifying deputies in case of emergency or holidays and getting support in office work Year of introduction: 1995; longitudinal	council)	of 40	workers)		- 6 - 7
7	Schalm GmbH & co. KG	36	14% women older workers (1 person)		Interest of the firms' owners in a motivating, health-conducting workplace Year of introduction: 1997; longitudinal	(no works council)	all workers	Original: - all workers Current: - all workers - workers above 40 years	retention	Original and current: - 3 - 4 - 6 - 7 - 8
8	DE08 Transport Equipment]	326	9% women older workers		Participation in a branch-related project because of large share of older workers	No information	Original: - workers with long tenure - shift workers	Original initiative: - workers with long tenure - all workers	retention	Original: - 1 - 4 - 8 - 9

Nr.	name of organisation	exact size of Establishment	% of men and women workers aged 50+	motivation of the firm for age management	nature of social dialogue	target group in original a. current initiative	age profile in original a. current initiative	retention or of original initiative	age approaches* management
				and interest in “reasonable” measures of transition to retirement and age-adequate deployment. Year of introduction: end of 1990s; longitudinal		Current: - all workers	Current: - all workers (planned: for workers with long tenure)		Current: - 1 - 3 - 4 - 7 - 8
9	DE09 Metalworking	70,000	13% women 20% older blue-collar workers, 26% older white-collar workers	Monitoring of societal trends, realisation that demographic change is a challenge for productivity, commitment to a sustainability strategy Year of introduction: 2004; longitudinal (albeit not documented before)	The management was the driving force for the initiative, but cooperation with works council is “very fruitful” and “well-functioning”	Pilot study “Work system 2017”: 42 assembly workers Current measure: Pilot manufacturing lines with blue-collar workers at every site (400 workers) Other measures: 28,000 workers (health screening), 12,270 workers (bonus system for health-conducive behaviour),	Original initiative: assembly workers with average age of 47 years Current measure: assembly workers of any age	retention	Original: - 2 - 6 - 7 Current: - 1 - 2 - 3 - 6 - 7 - 10

Nr.	name of organisation	exact size of Establishment	% of women and workers aged 50+	men, and aged	motivation of the firm for age management	nature of social dialogue	target group in original a. current initiative	age profile in original a. current initiative	retention or of original initiative	age approaches* management
							780 workers (reduction of working time with means of 5-20 additional days off) Currently prepared: roll-out to 1,200 blue-collar workers, roll-out to white-collar workers planned			
10	Schumann und Schulze Haustechnik	8	12,5% women (1 person) 62,5% older workers (5 persons)		Participation in a 'demography project' in the years 2001-2003 with the goal of employee retention, increase of attractiveness for new workers and professionalisation of personnel management. Year of introduction: 2001;	(no works council)	All workers	All workers (but workers have aged considerably since implementation)	retention	Original measure: - 3 - 4 - 7 - 8 Current measure: - 3 - 7 - 8

Nr.	name of organisation	exact size of Establishment	% of men and women aged 50+	motivation of the firm for age management	nature of social dialogue	target group in original a. current initiative	age profile in original a. current initiative	retention or reduction of original initiative	age approaches* management
				longitudinal					
11	Wurst Stahlbau	180	0,1% women among blue-collar workers and 8% among white-collar workers 38% of workers 51+ (among 150 incumbent workers)	Retention and attraction of new workers by provision of non-monetary incentives, improvement of workers' health and motivation Year of introduction: 2005; longitudinal (although not documented before)	no works council, but measures are introduced in a participatory manner	All workers Some measures focus on assembly workers which are thought to be especially prone to early exit Managers Know-how transfer: six two-person teams of white and blue collar workers	All workers	Retention; partial reduction due to low take-up rates	Original: - 1 - 2 - 3 - 6 - 7 - 8 - 9 Current: - 1 - 3 - 6 - 7 - 10
12	Kayser-Threde GmbH	250	20% women 32,4% older workers	External motivation by employers' association, also interest in founding out whether age structure could pose a problem in future, interest in improving employee retention,	Unionisation ratio close to 0%, works council participating in initiative	Original: managers, workers 50+ Current: all workers, workers with high level of competencies	Original: older workers Current: older workers + workers of all ages	retention	Original: - 2 - 3 - 4 - 6 - 7 Current: - 1 - 3 - 4 - 5

Nr.	name of organisation	exact size of Establishment	% of women and aged 50+	men and aged	motivation of the firm for age management	nature of social dialogue	target group in original a. current initiative	age profile in original a. current initiative	retention or reduction of original initiative	age management approaches*
					recruitment and know-how transfer. Year of introduction: 2005-2008; documented in project report; longitudinal.					- 6 - 7 - 10

* dimensions of age management approach:

1. Job recruitment
2. Awareness raising, changing attitudes and diversity
3. Training, lifelong learning and knowledge transfer
4. Career development and mobility management
5. remuneration, i.e. consideration of bonus and salary systems
6. Flexible working practices (including working-time arrangements over the life-course and reconciliation of work and family life/care)
7. Health protection and promotion and workplace design
8. Redeployment and retention
9. Employment exit and the transition to retirement
10. Comprehensive approaches.

PART THREE: CASE STUDIES IN ORGANISATIONS

CASE 1: KSB AG

Executive summary

KSB AG (KSB limited company) is headquartered in Frankenthal and produces pumps, fittings and associated systems. In 2001 the company started a project titled “Motivating working- and qualifying concepts for older male and female employees at KSB AG”. Meanwhile, the measures developed at that time in the fields of job design, health promotion and human resource management are elements of a broader dimensioned demographic- and diversity management. For its activities the company was awarded with the innovation-prize “AKTIV 2002” (“ACTIVE 2002”) by the Rheinland-Pfalz (Rhineland-Palatinate) ministry of labour, social-, family affairs and health.

1. Organisational background

Metadata:

Criteria	Parameter value
Size (employees)	- Large (2,000 at site, 4,000 Germany-wide)
Sector	- Production (mechanical engineering) - Private
Work council	- Yes
Business volume	- 768 millions of Euros

KSB AG (KSB limited company) was founded in 1871 and is a company of mechanical engineering branch. The company develops, produces and distributes pumps, fittings to shut off and to regulate liquids as well as corresponding control-, drive- and monitoring systems. Moreover, services are offered appropriate to technical components. KSB AG is owner of Klein Pumpen GmbH (Klein Pumps Corporation) and holds about 80% ordinary shares of that company. In 2009 the company achieved a turnover of 768 millions of Euros. As a producer of capital goods KSB is also affected by current financial- and commercial crises: many industrial companies reduced or deferred investments in new production facilities which has led to a downturn in demand for pumps, fittings and associated systems. Additionally, the competitive situation has got worse in the past years as new greater competitors arose along with processes to concentrate companies within the branch. Despite of the difficult commercial environment the company could sustain its position rather successful because of its broad customers- and projects spectrum and was able to realise the second-best result in the company history in 2009.

As internationally oriented company KSB maintains 34 production plants in 19 countries and is present in over 100 countries with own sales companies and service centres. Corporate headquarter and parent plant (which is the biggest European plant at the same time) are located in Frankenthal (federal state of Rhineland-Palatinate). Coincidentally, most of the

research- and development capacities are concentrated at this location. Worldwide the company employs about 14.000 people, thereof about 4.000 in Germany (Frankenthal: about 2.000). Regarding German locations 60% of the personnel is employed in production areas, the share of women is about 16%, about 7% work part-time. The share of unskilled and semi-skilled workers is less than 10%, about 80% of the production personnel are skilled workers. The average age at Frankenthal location is currently about 43 years, appr. 30% employees are 50 years of age and older. The average long job tenure is 20 years, the labour turnover rate is low at 2,9%. Partly employees of third- or fourth-generation work for the company.

The company is member of the association of metal- and electrical industry Rhineland-Palatinate; collective bargaining partner is the trade union IG-Metall (Industrial Union of Metalworkers). The employees are represented by a works committee of 19 members. The interviewees describe internal labour relations as constructive and confident. A positive working atmosphere marked by tolerance and mutual respect is actively promoted by the company.

2. Age management approach

Against the background of high and specific demands for the qualification of employees the company traditionally pursues a labour force strategy which is focused on a long-termed staff retention and –development. Consequently, a positive working climate is important for the company. To name an example, since 2005 a works agreement has been existing regarding “cooperative relationship at work”. Further activities in this field are obligatory trainings for management personnel in order to sensitize them for the subject of “mutual appreciation”, including the managing of an ageing workforce. Moreover, internal cooperation shall be promoted by regular feedback-interviews.

Since 2004, the increasing internationalisation of the company has been leading to the development and institutionalisation of a diversity management. Meanwhile, a social- and diversity-representative engaged only for this objective is responsible for diversity management. In this context, activities to promote diversity are not only reduced to the cooperation with foreign employees and customers. The official KSB-code of conduct became valid in 2007 and specifies: “The cooperation between superiors, colleagues and team members shall be guided by professionalism, mutual respect and fairness in all sectors of the company and in all regions. We take cultural differences into consideration. It is our pronounced objective not to disadvantage any person because of individual characteristics, such as age, race, religion, skin colour, sex, sexual orientation, handicap, national origin, descent or marital status. We don’t tolerate discrimination, annoyance or reprisals in working environment.” Since 2006 an official complaints department for subjects of The General Equal Treatment Act has been existing in the company.

Considering demographic changes and corresponding shortage of skilled workers KSB furthermore started different measures to equate opportunities for women and to improve the compatibility of family and work. The latter is especially advanced by a flexible and family-friendly working time system. Already since the 1990s flexitime models have been existing as well as compensatory time tracking records and long-termed working time accounts. Although those were primarily launched to organise working capacities in a flexible way they also allow personnel-oriented adaptations of working time. Moreover, part-time employment

is possible with loss of income. A working time regulation on mutual trust is valid for the office staff sector. In the enterprise areas which admit this organisationally employees with family commitments can do teleworking. Moreover, KSB is cooperating with a family service which helps to arrange care options for child care and care-dependent relatives.

In order to maintain employability of the personnel in the long run, the company takes manifold efforts in the fields of health promotion and job design, especially taking into account the needs of older employees. Since 1993 a work group for health promotion operating company-wide across all locations has been developing and implementing a lot of different measures. The basis for action is given by a regular health reporting system conducted in cooperation with the company's health insurance funds. The range of occupational health services offered currently includes amongst others preventive examinations and health check-ups, risk factors analyses as well as advisory services concerning workplace-related complaints, diseases or age-related limitations of job performance. On the part of the company's health insurance funds a health programme specifically for older employees was developed. The early promotion of a health-conscious way to live and work takes place in line with vocational education, e.g. in form of a special training how to handle heavy stocks. In office sector activities are carried through regularly to support back protecting sitting positions and working methods. Furthermore, there is a wide range of sports and fitness facilities.

In the field of labour organisation ergonomic criteria are considered particularly. Team work which was originally introduced because of economic reasons provides opportunities for the change of work loads and for job-immanent learning. Load-reduced adapted workplaces are offered to employees who cannot remain at their regular places of work for health-, disability- or age-related reasons. The statutory reintegration management is regulated by a works agreement, including amongst others that the department in which the affected employee works is first responsible to ensure the continuation of an adequate employment.

A continuous qualification of employees which embraces the entire employment biography is supported by numerous measures of further training and human resources development. For this objective the enterprise amongst others runs a company-owned training centre with a comprehensive programme of further education. Moreover, analyses regarding qualification requirements and potential capacity are important instruments in the field of human resource development. Those analyses are carried through in line with regular appraisal interviews, which are also held with older employers. These actually form the basis for an advancement planning which is individually tailored. In this context and in addition to a hierarchically structured management career the company started to implement alternative career models (specialist- and project careers) a few years ago. These alternative models allow professionally experienced employees to contribute their specialist-knowledge without bearing responsibility for departments and personnel. Corresponding career paths shall provide the opportunity to offer adequate and attractive tasks to qualified personnel, e.g. older executives.

Despite of its good reputation as employer, its international orientation and closely related to this its larger junior staff reservoir the company is increasingly faced with recruitment problems and foreseeable personnel shortages. Overall, the competition for qualified specialist- and management personnel has got worse, especially in the sector of engineers. Additionally, demographic changes and decreasing numbers of graduates in technical studies will play parts in creating shortages of adequate candidates in some countries. At the

same time, the high average age of the staff at German sites will lead to a bigger attrition of the workforce in the years ahead. In this context, an age structure analysis conducted in 2007 came to the result that leaving the company by retirement will add up to about 18% within the next 10 years and to about 48% within the next 20 years. There are also regional-specific disadvantages (e.g. lack of industrial and/or metropolitan environment and closely related lack of skilled workers- and academics potential). The company reacted on the problems mentioned amongst others with an increase of apprenticeship quota and staff expansion in the last years.

3. The original measure

Characterisation of the starting initiative

Metadata:

Criteria	Parameter value
Target groups	<ul style="list-style-type: none"> - All workers - Qualified workers (older executives) - Managers - Parents - Persons with health problems
Type of measure	<ul style="list-style-type: none"> - Job-recruitment - Training - Career development - Flexible working practices (team work, work-life balance) - Health promotion and ergonomics and job design - Retention - Transition to retirement - Changing attitudes (diversity management) - comprehensive approaches - other: leadership, extra bonuses to older people (holidays, wage downgrading protection)
Social partners involved	<ul style="list-style-type: none"> - Unknown
Scope of measure	<ul style="list-style-type: none"> - Age-specific - Overarching

Due to a corporate crisis KSB reduced personnel considerably in 1996 and 1997. Then, about 1000 jobs were cut via social plans. On one hand younger employees were affected in line with social selection criteria. On the other hand employees older than 56 years were focussed as the early retirement scheme could be applied in those cases. In this way job cuts should be organised in a more socially agreeable and less conflict-burdened way. However, the approach has subsequently led to a number of not-intended side effects:

- Redundancy of younger employees and hiring freeze led to a higher average staff age and in the following years to wider gaps in the age group of 30-40 years despite of the

early retirement strategy which was run in parallel.

- Early and abrupt release of larger groups of employees in line with early retirement programmes led to losses of knowledge within short time which was hardly to compensate. Partly expensive activities to recall senior experts were necessary.
- Many employees had a particularly distinctive desire for an early retirement. Moreover, for many older employees the consolidated expectation of an early retirement as well as frequent discontent with the work situation led to decreases in motivation and to a declining readiness for changes.
- Due to the emerging socio-political paradigm change towards a prolongation of working lifetime the company was generally faced with the question of adequate strategies regarding human resource allocation and –development for its older employees.

The visit of the former Rhineland-Palatinate labour minister in 2001 and the discussion held at this occasion about the situation of older employees led to the company's decision to participate in a model project subject to "prolonged retention of older employees in companies". This model project was initiated as well as financially and conceptually supported by the labour ministry. In the same year a project titled "motivating work and qualification concepts for older employees" was implemented at KSB location Frankenthal. External support and monitoring was given by RKW Rationalisierungs- und Innovationszentrum der Deutschen Wirtschaft e.V. (Rationalisation- and Innovation Centre of German Economy which is a registered association), which subsequently developed guidelines based on the insights gained in the project.

After presenting the background of the project to the staff during a works meeting, a first step was to establish a company-internal team consisting of members of personnel department, works committee and social service. In the course of a workshop this team developed a project conception. Additionally, RKW consultants held expert interviews with management personnel as well as representatives of works committee and personnel department in order to gain information about the labour situation of older employees. Moreover, a written employee survey was conducted. Afterwards two workshops were realised with older employees, one in production- and the other in office staff sector. In both workshops the reasons for the popular wish for an early retirement were identified in detail. Another workshop objective was to clarify the conditions under which employees could imagine to remain in the company, i.e. beyond the 60th year of age. Both workshops were attended by about 20 employees each and took place on the job and on voluntary basis. Furthermore, every workshop was attended by a works committee representative, while representatives of the personnel department remained absent in order to guarantee an open conversation atmosphere. Consultants of RKW moderated the workshops. The results were subsequently passed on to personnel department and works committee in anonymised form. As a result, employees emphasised the following aspects and considered them to be especially relevant for the decision to stay longer on the job:

- Appreciating leadership, open communication and transparency of business objectives and -strategies;
- Security about job perspectives during the last years in the company, especially regarding internal processes of change;
- Professional career opportunities and –development as well as a staff planning which

considers practical knowledge;

- Training opportunities and age-specific further training programmes;
- Reduction of work loads, especially of burdens in form of shift-, night- and extra work as well as high pressure on time and performance.

In the course of a follow-up workshop and meetings with works committee and management wishes and suggestions of the employees were evaluated according to priority and feasibility. On this basis, members of human resource management and works committee as team developed a programme of measures which were graded according to age:

- From the age of 55 future development perspectives shall be discussed and adequate fields of application for senior experts shall be identified in line with annual appraisal interviews. Furthermore, computer trainings are offered with regard on participants from homogeneous age groups and on age-specific teaching of course material.
- From the age of 58 employees can ask to get released from night work even if there is no impairment to health. Time credits can be used to reduce weekly hours of work provided there exist appropriate stocks of the long-term compensation time account.
- From the age of 60 a wage assurance can be applied in case of organisational changes or transfers. Pre-condition is the long job tenure of at least 25 years. Moreover, management employees can be dispensed from their executive function without losing income or status and they get support to find alternative fields of application.
- From the age of 63 three additional paid vacation days as well as a prolonged sick pay are granted. In case of serious diseases once-only the entire net-salary is paid for three months.

Additionally, special training was developed to prepare employees for retirement. This training is offered to employees who are to retire within 12-18 months and can be attended together with their (marriage) partners at no charge.

Furthermore, trainings for management personnel were conceptualized and offered obligatorily in order to sensitise this group of people for the specific needs of older employees. At the beginning, these obligatory trainings and management staff feedback which additionally was implemented later were accepted with reservation by the management personnel. Existing analyses systems regarding evaluation and potential capacity were also adapted in this context in a way that depicts specific know-how and specialised knowledge, possible qualification requirements and occupational interests of older employees. On one hand, an optimal human resource allocation should be guaranteed and possible alternative fields of application should be identified with these adaptations. On the other hand, in line with a qualitative staff planning these instruments serve to initiate early succession plans and possibly necessary transfers of knowledge which requires phases of introductory trainings.

In order to optimise knowledge transfers mentoring models which already had been practised before were advanced and systemised. In these models, junior employees are assigned an experienced employee who passes on his know-how and relevant network-contacts. The selection of appropriate mentors is based on the results of performance appraisals. Tandem models are also practised in the production sector where e.g. older production workers guide younger skilled workers. The mentors are partly released from their main tasks in the phases

of introductory training and mentoring which has no impact on their salary. Consequently, the reduction of work loads at the same time is a positive side effect.

Moreover, a team was established to identify fields of application for employees with changed performance from production sector and to systemise existing fields of activity concerning load- and requirement profiles. Objective is to keep clear adequate work places, e.g. in tool departments, and to use them for this group of people in line with occupational reintegration management. In order to realise this objective tasks which had been outsourced to external companies were partly reintegrated to KSB.

The various measures were implemented until 2003 in a stepwise introduction process, flanked by extensive in-house public relation measures (amongst others reports in the in-house magazine, posters, flyers). Moreover, the project led to a broad regional and trans-regional media response. In 2002 the company was awarded for its activities with the innovation-prize “sozial AKTIV 2002” (“socially ACTIVE 2002”) by the Rheinland-Pfalz (Rhineland-Palatinate) ministry of labour.

4. Development of the initial measure and current practice

Good practice in flux – development and change

Metadata:

Criteria	Parameter value
Status of initiative	- Continuation

Continuation or shift – the current state of affairs

Metadata:

Criteria	Parameter value
Target groups	<ul style="list-style-type: none"> - All workers - Parents - Occupational groups in fields which could be affected by personnel shortages in future
Type of measure	In addition to the above mentioned measures: <ul style="list-style-type: none"> - Other: personnel planning (age structure analyses); networking
Social partners involved	- Yes
Scope of measure	- Overarching

Despite of the positive resonance the motivation project got into a serious crisis of credibility in the period that followed. The reason was to be found in a rationalisation programme which was launched already one year after the project had been started and which led to extensive staff downsizing through early retirement measures. More than 500 employees retired early from the company. This intermediately led to a loss of confidence and caused criticism.

However, the measures developed in the project are still valid and evaluated as sensible and all in all successful by both employer and employees, even if no systematic programme evaluation has been conducted. Especially qualification- and health programmes meet high demand. Furthermore, positive effects are reported regarding an overall improvement of works climate, company image as well as the sensitisation of management personnel for the concerns of older employees and for the effects of demographic changes. By contrast, possibilities to get released from nightshift have been hardly used which is explained as a result of the corresponding discontinuation of hardship allowances in line with financial losses. Regular nightshift is currently practised at one KSB location only. Also the offer to get released from personnel responsibility has been asked for only to a small extent so far.

Meanwhile, concepts are integrated in a demographic management which rather tends to include all age groups. The conceptual framework for action is broader dimensioned and embraces amongst others activities in the fields of personnel recruitment and –development, qualitative staff planning, compatibility of family and work as well as diversity management. A project subject to “demographic fitness” is in planning currently. The objective is to define in detail impacts and consequences to take action for the company regarding demographic changes and to relate them to business strategy. The company especially focuses the question of occupational groups in fields which could be affected by personnel shortages in future. Then, based on this analysis additional personnel measures shall be developed and existing concepts shall be updated. Age structure analyses are already conducted periodically for quite some time.

Moreover, KSB is member of the company network “Initiative Wissensfabrik – Unternehmen für Deutschland e.V.” (“Initiative Knowledge Factory – Companies for Germany” which is a registered association) founded in 2005. The network is engaged in various educational projects and promotes entrepreneurs. Amongst others KSB-retirees are engaged as mentors in line with this network.

5. Concluding reflections from the researcher

According to the interviewees the project “Motivating working- and qualifying concepts for older male and female employees at KSB AG” has an important initialising function regarding the development of a comprehensive demographic-oriented personnel policy. In this context especially following aspects turned out to be encouraging:

- Constructive internal labour relations as well as the support of the project by works committee and management;
- The high professionalisation degree of human resource management and established instruments and methods, which are basis for new developed measures;
- A participating handling which takes into account interests of employees;
- The publicity support of the project by the ministry and the positive public resonance;
- The favourable economic situation of the company.

Different from former times the company reacted on latest commercial- and financial crises and corresponding underutilisations in various production sectors with adaptation measures which aimed at the retention of the core workforce: therefore employees reduced time credits of individual working-time accounts and residual leaves; annual leaves were placed at times when orders were sluggish. Furthermore, employees were transferred to fields with higher

workload and tasks were reintegrated which formerly had been outsourced to external companies. Moreover, the instrument of short-time work was used at some sites. However, despite of changed pension law regulations the company will continue to offer partial retirement regulations in future and to make use of early retirements for personnel adjustment if needed. Momentarily, an updated agreement for partial time retirement is being prepared.

Contact details:

Armin Zisgen, human resource manager

Email: armin.zisgen@ksb.com

www.ksb.com

Other interviewees: Heinrich Müller (chairman of works council at Frankenthal site, chairman of company works council)

CASE 2: üstra Hannoversche Verkehrsbetriebe AG

Executive summary

üstra Hannoversche Verkehrsbetriebe AG (üstra Hannover transport services corporation) was founded in 1892 and is a company of local public passenger transport, which provides its transportation services in Hannover city and closer surrounding area.

Against the background of increasing staff ageing, rising qualification requirements and high health hazards in the driving service the company has implemented a broad range of measures regarding labour organisation, human resource development and health promotion. In line with a demographic project and despite of narrow financial and organisational fields of manoeuvre a job rotation model was developed for the driving staff which is being tested in the bus division. In 2008 the prize "Unternehmen mit Weitblick" ("enterprise with foresight") was awarded to the company for its demographic project in line with the federal programme "Perspektive 50plus" ("Perspective 50plus").

1. Organisational background

Metadata:

Criteria	Parameter value
Size (employees)	- Large (1,900)
Sector	- Public service (transportation)
Work council	- Yes
Business volume	- Sales revenue of 165,300 thousand Euros, balance sheet total of 244,199 thousand Euros

üstra Hannoversche Verkehrsbetriebe AG (üstra Hannover transport services corporation) was founded in 1892 and is a company of local public passenger transport, which provides its transportation services in Hannover city and closer surrounding area. üstra is the biggest communal traffic enterprise in the federal state of Niedersachsen (Lower Saxony) with its 51 routes, more than 600 kilometres route-network, over 800 stops, 290 light rail vehicles, 135 buses and more than 150 million passengers per year. The company's annual report for 2008 shows a sales revenue of 165,300 thousand Euros and a balance sheet total of 244,119 thousand Euros. üstra's current economic situation is favourable, amongst others due to the realisation of considerable efficiency enhancement and increase of customers despite of fare rises during the past years. Leading shareholder with a stock option of around 99 % is VVG - Versorgungs- und Verkehrsgesellschaft Hannover mbH (Public utilities and Transport company Hannover Ltd.), which is a holding of federal state capital Hannover and region of Hannover. Currently, about 1900 employees work for the company (transport staff: 48%; technical staff: 26%; clerks: 23%; apprentices: 3%), thereof about 250 female employees. The average age of the staff is approx. 45 years and there are about 36% of employees in the age group 50-65 years. Most of the persons employed work full time (94%).

In the company exists a works committee with 17 elected members. üstra is characterised by a distinctive culture of participation. In organisational terms the works committee as co-management is located next to the board of management. According to coordinated methods strategic management decisions are worked out together by the actors of internal labour relations and have to be agreed upon mutually. Moreover employees are actively involved in development and implementation of organisational changes in form of project teams and task forces.

The normative basis for this participation-oriented business culture is given by a works agreement between works committee and management contracted in 1993 (“Contract of Confidence”), in which both parties commit their mutual contribution to safeguarding the company’s future. Objective is to increase the company’s profitability and competitiveness (quality- and service improvements, cost minimising, increase of innovative ability) and at the same time to provide social security of employees and to establish human labour conditions. Background for this agreement is to be seen in the liberalisation of the market for public transport services in the 1990ies forced by European competition policy and the resulting increase of competitive pressure through private suppliers. Additionally, the rise of fuel- and energy prices and the tense financial situation of local authorities have led to the reduction of compensatory payments for the supply of public enterprise services.

Moreover, the region of Hannover, üstra, works committee and trade union ver.di entered a long-termed partnership agreement (“vitale üstra 2020”) in 2008. In this contract the company agreed to extensive cost reductions, increase in profit and quality as well as to restructuring measures required to reach these objectives and consequently unburden local authority association in financial terms. In return the region renounces on a bid invitation for transport services and partly takes over outstanding payments for company pension scheme during the period of agreement. A wage- and employment security until 2020 is granted to the employees provided they participate in the restructuring process. The agreement is linked to the company’s change of strategy in 2006: after the cooperation with another transport company collapsed (amongst others because of potential antitrust difficulties and missing synergy effects) the company distanced itself from the expansion strategy pursued by then and initiated a change of course in direction to stronger concentration on core business and on the region of Hannover.

2. Age management approach

Characterisation of the starting initiative

Metadata:

Criteria	Parameter value
Target groups	<ul style="list-style-type: none"> - Qualified workers (drivers) - Other measures for apprentices and parents
Type of measure	<ul style="list-style-type: none"> - Training - Flexible working practices (team work, job rotation, work-life balance) - Health promotion and ergonomics and job design

Social partners involved	- Yes
Scope of measure	- Overarching

Üstra's situation regarding human resources management is characterised by the following problem constellation:

- Executing work in the driving operation of local public in general shows a range of eminently critical characteristics regarding age. Amongst others shift- and nightshift work, high demands on attention, continuous time pressure, stress load through traffic and customers, high pressure regarding responsibility, social isolation, climate burden, lack of motion and unbalanced muscle load. Physical and psycho-mental stress is reflected in increased absenteeism quotas and early disablement for driving service. For üstra the problems mentioned are intensified by the tightening of timetables in transport services, which has to be seen against the background of higher cost pressure through rationalisation processes leading to a higher workload.
- At the same time, the required efficiency enhancements have led to a surplus of personnel in almost all organisation areas of üstra. Considering the agreement of employment security üstra has reacted on this with personnel reduction in a socially acceptable way (reduction of new engagements, early retirement measures). Thus, almost 1000 jobs have been reduced since 1990ies. Downsizing, hiring freeze and long job tenure have led to an ageing of the staff.
- Early and abrupt retirement of larger staff segments through partial retirement- and early retirement programmes have led to a loss of know-how in some company areas which is hard to compensate.
- The expiration of hitherto existing legal regulations regarding partial retirement and corresponding wage agreement regulations are likely to constrain future usage of this instrument for staff reduction measures to a remarkable extent. Furthermore, the raise of legal retirement age enacted by Federal Government will necessitate a longer engagement of older employees in the future.
- Possible load-reduced jobs for employees with changed performances in driving service sector have been considerably reduced during the past years through processes of rationalisation, mechanisation and outsourcing. This is aggravated by changes of numerous job profiles in the enterprise, accompanied by higher qualification requirements. Especially in driving service employees of higher age practice jobs which are different from their vocations learnt and they joined the company as lateral entrants. Thus vocation- and branch specific qualifications are often missing which limits assignment flexibility for those employees merely to driving service.
- More than 500 retirements are determined until 2019 and approx. 2/3 of these jobs will have to be staffed again. Correspondingly, rates and qualifications of applicants have declined during the last years. Moreover increased qualification requirements (amongst others vocational driver qualification law, higher demands on service quality) reduce flexibility in recruiting lateral entrants with vocations different from the area of expertise needed.

Against this background the company already began to react on the problems mentioned quite some time ago. This is to be seen in a wide range of different measures and

programmes for the staff which mainly include all age groups. According to the interviewee, üstra pioneers regarding the development of innovative personnel management concepts within German local transport sector, which also rests on the cooperation- and participation-oriented labour relations resp. co-management of the works committee.

Already by the end of the 1990ies mixed- and team work concepts were implemented for driving service in form of integrated work tasks to reduce unbalanced loads, to increase work motivation, to organise work more conducive to learning and to make the most of employees' qualifications. Moreover, team-oriented work arrangements, less split of labour and flat hierarchies shall help to design work processes and organisation structures all in all in a more efficient way. The team work concept envisages a route management in the way that a team of drivers is responsible for vehicles and a master route allocated to them. Tasks of the team are amongst others holiday planning and crew scheduling as well as the development of suggestions to optimise work processes (e.g. improvement of timetables, routing, customer service, reduction of fuel consumption through change of driving behaviour, and so on). The driving teams get a special training on team work and continuous information about their route regarding ridership, customer satisfaction, fuel consumption, and so forth. At the mixed work concept employees take over additional tasks in administration-, service- or workshop departments. A special model is given by a so-called "medical mixed work" for bus drivers with reduced driving service capability, in which buses are staffed with two drivers who take turns in driving- and service tasks. But, according to the interviewee, the mixed work concept has widely faded out meanwhile, as possible mixed work fields have been reduced in the course of rationalisation processes or they are linked to higher qualification requirements. To make matters worse, employees from departments outside of driving service are hardly willing to take over driving tasks because of unfavourable working conditions. Therefore there is a lack of "mixed work partners". Moreover, for this group of persons the effort of required further training is partly too high as necessary driving qualifications (driver's licence, etc.) are missing or outdated.

Additionally, there exists a comprehensive health promotion programme which includes amongst others company sports activities (various company sports groups, company-owned fitness rooms), preventive medical examinations through the company's medical service (e.g. blood glucose-, cholesterol-, blood pressure-screenings) and various advisory and training services (amongst others hypertension instruction, back exercises programme, stress prevention training, psycho-social employee counselling). The company reacted on increased demands on qualification and flexible staff employment through intensifying staff development activities. üstra was one of the first German local transport companies to establish already in 2005 the new apprenticed vocation "Fachkraft im Fahrbetrieb" – FIF ("public transport professional"). Alongside to the preparation for driving service the three-year apprenticeship emphasizes amongst others the qualification for tasks in the fields of customer service, marketing as well as planning and organisation of public transport.

In the more recent past activities were extended to improve the compatibility of family and work. Amongst others activities like the development of a "keeping in touch and consulting programme" for employees in times of parental- and care duties, the arrangement of administrative telework places, the implementation of a parent-and-child-room, the training of management personnel for the subject matter and the cooperation with an external family service. Moreover, the organisation of the shift plan in driving service was optimised: 75% of the driving staff meanwhile can work in a family-friendly two-shift system (early and middle

resp. middle and late) and can choose between rotation plans; this organisation leads to a weekend off every third week. In the enterprise areas which admit this organisationally various part-time models and flextime arrangements are offered allowing employees to decide beginning and end of working-time on own responsibility within a fixed working-timeframe. Since 2006 the company is certified according to Hertie trust “audit work and family”.

3. Current practice and how it has evolved

Good practice in flux – development and change

Metadata:

Criteria	Parameter value
Status of initiative	- Continuation

Continuation or shift – the current state of affairs

Metadata:

Criteria	Parameter value
Target groups	- Qualified - Apprentices - Managers
Type of measure	- Job-recruitment - Training - Career development - Health promotion and ergonomics and job design - Flexible working practices - Transition to retirement - Comprehensive approaches - Other: succession planning, leadership
Social partners involved	- Unknown
Scope of measure	- Age-specific - Overarching

Under the impression of aggravating problem areas in personnel management which are connected to increasing staff ageing, in 2008 a demographic project was started in addition to existing activities. The project was classified as so-called “A-Project”, which means that the project was given high priority and company-wide relevance. Moreover, activities were flanked by extensive public relation measures (amongst others continuous reports in the inhouse magazine).

Conducted by a project team consisting of the head of staff position personnel, the company doctor, a member of personnel counselling department, the human resources representative and a member of works committee on one hand and involving employees to a wide extent on the other hand suggestions for measures were compiled in various operational fields:

succession planning, teamwork, working-time, health management, human resources development and recruitment marketing. Overall 19 suggestions for measures were developed in the course of several sub-projects in the listed fields. Partly those measures have been implemented meanwhile and partly they are to be improved furthermore or they are tested in a pilot phase.

One of the measures in planning is the introduction of an additional part-time option (“full-time light”) for driving service, in order to organise work reductions more attractive for employees concerned by a modest salary deduction. The implementation of working-time accounts is also in planning which shall allow employees to save time credits (e.g. for working overtime) in order to realise an earlier retirement. In addition, a working team is structuring a working place register at present with the objective to categorise existing working places in the company according to age appropriate criteria and to identify possible areas of application for employees with changed performances.

Already implemented measures are amongst others the use of a work coping index alongside with preventive medical examinations through the company’s medical service as well as the development of succession planning and a systematic know-how management for managerial- and expert functions. The latter includes the creation of “tandems”, in which retiring and succeeding employees work together for a transitional period in order to guarantee that company-relevant know-how is passed on and saved. Moreover, a method to gather and document practical knowledge is in use which was developed by the project team. And since 2008 obligatory seminars for leading employees are conducted with the objective to sensitise them to the subject of an “ageing staff”. About 60-70% of the management personnel meanwhile have passed this training.

Since the beginning of 2010 a rotation concept for driving service is in a test phase which is an advancement of the earlier mixed work model. In the course of a pilot project a group of bus drivers switch to ticket control service in a regular rotation. The drivers concerned had been qualified for the new tasks previously. Objective of changing tasks is to allow changes and reductions of burdens and to increase flexible staff employment. Intention was originally to offer the rotation model for older employees only. But the initiative didn’t attract the expected interest of the target group, so that other age groups were integrated, too. As far more employees wanted to join the project than rotation places were available a selection procedure was executed. The project is carried out in cooperation with the subsidiary company protec service GmbH which takes over security- and facility management for üstra including ticket- and passenger control. Different from the earlier mixed work concept the new rotation model doesn’t involve a reverse change of control personnel to driving service. Instead, additional drivers are appointed in bus division in order to guarantee an adequate staffing. In return, protec abstained from new hires necessary in control service area. It is planned to extend the rotation concept to the light rail sector in 2011 and gradually to open up further rotation fields beyond control service.

In 2008 the prize “Unternehmen mit Weitblick” (“enterprise with foresight”) was awarded to the company for its demographic project in line with the federal programme “Perspektive 50plus” (“Perspective 50plus”).

4. Concluding reflections from the researcher

Despite of the company's previous efforts to advance the employability of the staff the interviewees judge an employment in driving service up to regular retirement age as fairly unrealistic under actual framework conditions. Therefore, the extension of rotation- and mixed work concepts is consistently favoured as they basically fix the load problems. Following aspects are emphasized to estimate chances for those concepts:

- The professionalisation of driving service activity which was brought forward by the introduction of the new apprenticed vocation "Fachkraft im Fahrbetrieb" – FIF ("public transport professional") will increase flexible use of driving personnel in the future and thereby facilitate job rotation and job enrichment.
- The new rotation model created great interest in bus transport branch but didn't attract the basic target group of older employees (amongst others because of unfavourable working times connected to the control service and increased stress load through passengers). According to the interviewees further rotation fields have to be opened up (e.g. in service- and administration area) in order to match interests and needs of older employees in a better way.
- Overall, suitable fields of activity for rotation- and mixed work models have been minimised by organisational streamlining- and outsourcing processes. Nevertheless, about 200 rotation jobs for drivers could be implemented theoretically only in ticket control service.
- All in all, considering the high cost pressure there are little financial scopes for far-reaching measures to structure labour. Therefore, continuation and enlargement of actual programmes are highly dependent on their economic success. Regarding the rotation model amongst others barriers turned out to be the necessity to engage additional bus drivers in order to ensure driving service and that employees working in the rotation project are assigned to a higher salary group than regular control service personnel. Anyway, cost-benefit analyses and alternative szenarios ("what happens if we don't take action") which had been realised prior to the project showed that the measures could also be profitable in economic terms in the long run (amongst others higher productivity, reduction of sick leave, diminishment of disablement for driving service).

Contact details

Dr. Ulrich Fischer, Stabsbereich Personal (staff position personnel)

E-Mail: Ulrich.Fischer@uestra.de

www.uestra.de

other interviewees: Uwe Köhler (company and group works council), Detlef Hachenberger (company division Stadtbuss [city bus]/division manager Stadtbuss Betrieb/company manager BO-Kraft)

CASE 3: Kreisverwaltung Recklinghausen

Executive summary

The district administration Recklinghausen is a local government which employs about 1440 people. In 2005 an integrated demography project was started against the background of the high staff age average and increasing work loads. In line with the project an extensive catalogue of objectives and measures was developed in the fields of health promotion and human resources development. The catalogue was subsequently incorporated in an establishment agreement (public sector) for an age-specific organisation- and human resource development and in organisational guiding principles. The district administration has already got several awards for its activities.

1. Organisational background

Criteria	Parameter value
Size (employees)	- Large (1,440 workers)
Sector	- Service (Public Administration) - Public
Work council	- Yes
Business volume	- non-profit, but account deficit of 50 millions € expected for 2010

The administrative district of Recklinghausen is an association of local authorities in the north-west of the federal state of Nordrhein-Westfalen (North Rhine-Westphalia), which embraces 10 cities and is the most populous administrative district in the federal republic with about 640,000 inhabitants. Local- and state-assigned tasks of the administrative district mainly concern the provision of goods and services in line with public services of general interest regarding health, education and care. The administrative district office which is the official residence of the district administrator at the same time is located in the city of Recklinghausen.

Due to increasing social welfare expenditures and decreasing fiscal revenues the economic situation of the administrative district has already been extremely tight for quite some time and has been marked by a growing debt overload which structurally intensifies. For 2010 a current account deficit over 50 millions Euros is expected. As many other municipalities in North Rhine-Westphalia the administrative district of Recklinghausen is also subject to the emergency budget law currently and therefore is strongly constrained regarding its financial autonomy.

The district administration currently employs about 1440 people, thereof about 320 civil servants. The share of women is approx. 56 %, approx 36 % work part-time. The average staff age is currently 47 years, 34 % employees are 50 years of age and older, the average long job tenure is 16 years, the disabled-employee quota is 8 %.

For the employees of the district administration the collective agreement for the public service (TVöD) is valid which was contracted between public employers and appropriate trade unions in 2005. The interests of the employees who are subject to the collective agreement are represented by an employee committee which consists of 13 members and is

involved in numerous boards. The interviewees describe internal labour relations as constructive and confident.

2. Age management approach

Framework conditions for the employment of older personnel are to be considered as comparatively favourable in the district administration due to relatively low physical stress and high job security. However, Germany's public services have gone through profound rationalisation- and modernisation processes in the past years which have also in the district administration have led to changes regarding labour situation. Therefore, several economic management instruments (amongst others code- and controlling systems, budgeting, contract management) were established in the 1990ties along with the concepts of "Neues Steuerungsmodell (NSM)" ("New Public Management") and "Neues Kommunales Finanzmanagement (NKF)" ("New Municipal Financial Management"). In this way efficiency and quality of official service provision should be optimised. Moreover, about 200 jobs have been reduced within the last 15 years due to the debt overload of the administrative district while coincidentally the range of tasks of the administrative agency has tendentially been enlarged (amongst others due to the delegation of tasks to municipalities by federal and state governments, enhanced expectations regarding client- and service orientation as well as the increased significance of conceptual-planning activities in contrary to pure tasks of an enforcement authority).

For the employees this modernisation process in the result led on one hand to a broader diversity of tasks and more demanding and more integrated job profiles. Furthermore, the human resource management was professionalized (intensified human resource development- and training activities, annual appraisal interviews, extension of staffing- and management competences through management personnel trainings, guidelines for management and cooperation). Further and advanced trainings are offered without age restrictions including advancement qualifications from middle to higher civil service for older employees. Already by the end of the 1990ties an occupational health management was additionally institutionalised (amongst others the establishment of the steering committee "Zentraler Arbeitskreis Gesundheitsförderung" ("Central Task Force Health Promotion") – since 2005 "Ausschuss für Arbeitsschutz und betriebliches Gesundheitsmanagement" ("Committee for Occupational Safety and Health Promotion") -, the formation of health circles within the various departments and the conclusion of establishment agreements (public sector) regarding mobbing prevention, personnel management, addiction- and conflict counselling, and others). In line with this health management a systematic health reporting system is run and a broad range of health promotion measures was developed (e.g. various health programmes, preventive check-ups, addiction- and conflict counselling, spinal health, and others). Additionally, various measures were initiated to improve the compatibility of family and work (amongst others flexitime- and part-time models, tele workplaces, advisory- and care services, management personnel trainings, further trainings during parental leave, and others). In 2005 the district administration was certified according to the "Hertie" foundation's "audit berufundfamilie" ("Career and Family Audit").

On the other hand the changes with a big impact on organisational structures, workflows and job descriptions partly led to overload situations regarding qualification (especially in form of adaptive difficulties with respect to fast technological changes) and were generally

accompanied by improved performance requirements and work intensification. Also working time extensions were added. The large cohorts recruited in the 1970ties, long job tenures respectively minor staff turnover, downsizing and hiring freezes at the same time promoted the gradual staff ageing. In addition, the unrestricted use of partial retirement regulations and at the same time existing staffing freezes partly led to losses of knowledge which are hardly to compensate and to frictions in the replacement of functions. Personal structures which are strongly age-centred and partial retirement contracts which are run numerously will lead to further extensive staff outflow in the future. In reverse, the minor staff numbers in the middle age groups lead to a foreseeable lack of junior executives, a development the district administration reacted on already in the past amongst others with enhanced vocational training efforts and with an internal career qualification programme.

3. Current practice and how it has evolved

Criteria	Parameter value
Target groups	<ul style="list-style-type: none"> - older workers (50+) representing the entire personnel spectrum reg. hierarchical levels, modes of employment, application areas, sex
Type of measure	<ul style="list-style-type: none"> - Diversity - Training - Career development - Flexible working practices - Health promotion and ergonomics and job design - Employment exit - other: age structure analyses - comprehensive approach
Social partners involved	<ul style="list-style-type: none"> - Yes
Scope of measure	<ul style="list-style-type: none"> - age-specific - overarching (health mgmt measures)
Criteria	Parameter value
Status of initiative	<ul style="list-style-type: none"> - Continuation

In 2005 the impetus was given to establish the work group “Zirkel 50+” (“Circle 50+”) against the background of intensifying organisational-demographic problems and health problems of older employees which were revealed in line with absenteeism analyses. The task of the circle on one hand was to analyse the staff ageing situation and associated consequences in the district administration headquarter and on the other hand to develop subsequently labour design approaches. The members of the demography-project were selected carefully and should represent the entire personnel spectrum regarding hierarchical levels, modes of employment, application areas, sex, etc. As further selection criteria it was determined that all participants should have reached the age of 50. Moreover, relevant office-holders and decision-makers were involved (employee committee, head official and department manager, head of personnel department, equal opportunities officer and the representative of disabled employees). An external moderation was conducted by the representative of a local health

insurance. Moreover, with its Circle 50+ the district administration participated in the model project "Age Management" ("Arbeitsfähigkeit und Gesundheit dauerhaft erhalten" / "Sustaining employability and health") which was subsidised by the federal state of North Rhine-Westphalia and European Union from 2005 to 2007.

In line with five project meetings three fields of action were identified by the participants and corresponding objectives and measures were worked out in the fields of labour organisation, health promotion, human resource development, recruitment marketing and transfer of knowledge:

- *Age-specific workplace:* in this field the implementation of ergonomic standards is seen as priority objective. To realise this objective a new budget heading shall be established and workplace- and risk analyses shall be conducted. Furthermore, decision makers and office-holders shall be sensitised for the topic and shall bear more responsibility.
- *Mediation of values, competence and knowledge:* this field of action aims at the promotion of teamwork, (recruitment-) marketing as well as at the transfer of values and knowledge. Suggestions are amongst others to form mixed age workgroups and mentoring programmes. Employees shall be imparted values, such as esteem, recognition, respect and confident communication. In the field of recruitment marketing a positive employer image shall be established and communicated.
- *Support:* objectives are defined concerning the conduction of age-structure analyses, the introduction of work-life-accounts and the offer of age-specific health- and further training measures as well as the reduction of workloads for older employees. Suggestions are amongst others specific sports- and further training offers (e.g. establishment of a company sports team 50+, computer trainings for older employees), advisory services (e.g. addiction- and conflict counselling, grief counselling), "job rotation"-concepts, measures for an occupational situation analysis and support regarding retirement preparation.

Following, the target- and measures catalogue was summarized in a brochure for employees („Zirkel 50+ - erfahren und gesund. Personal- und Organisationsentwicklung mit dem Erfahrungswissen älterer, langjährig Beschäftigter“ / "Circle 50+ - skilled and healthy. Human resource- and organisation development realised with the know-how of older staff members who have been employed for many years.") and fixed in an establishment agreement (public sector) („Dienstvereinbarung über eine altersgerechte Personal- und Organisationsentwicklung“, 2006 / "Establishment agreement (public sector) for an age-oriented human resource- and organisation development", 2006) as well as in a guiding principle („Wir gestalten Zukunfts-Vest: Leitbild der Verwaltung des Vestischen Kreises Recklinghausen“, 2008 / "We design future-Vest: guiding principle for the administration of county 'Vest' Recklinghausen", 2008 – 'Vest' = medieval district court). The specifications are currently implemented stepwise by responsible departments and office-holders (amongst others human resource- and organisation department, occupational health and safety practitioner, company medical services) and by various task forces. The "Circle 50+" thereby serves as controlling body which supervises and coordinates the introduction process, checks results regularly and possibly identifies needs for adaptation. Administration department and political committees are periodically informed about the progress of activities.

Measures already realised are an age structure analysis and an employee survey about working ability and employability, conducted in 2007 in cooperation with external organisational consulting and in connection with the project AGE-Management. In line with the age structure analysis not only the age structure at that time was focussed but also projections were generated for the years 2012 and 2017. In addition, differentiations were made for single groups of employees, organisational units etc. Result of the age structure analysis was amongst others that the average age of the staff will increase within the next 10 years up to 57 years of age under existing framework conditions. Moreover the staff will shrink significantly. A “self-check” (employees) and a “company-check” (executives) was conducted along with the employee survey in order to define the employability of the staff with regard on the dimensions “competence”, “health”, “learning aptitude”, “integration”, “(self) management” and “responsibility”. The results of the survey indicated stress loads through intensification of work, unfavourable factors regarding working environment (outdated furnishings, impact on working climate), discontent with existing further training- and advancement possibilities, with the conduction of superiors as well as with status distinctions between civil servants and other employees regarding salary, working times, advancement chances and access to further training offers.

Furthermore, the offer regarding health promotion measures was enlarged and supplemented with age-specific concepts. These include amongst others additional health-checks through company medical services, health care days and –seminars (amongst others regarding spinal health), enlarged sports programmes (e.g. company sports team 50+) and the extension of addiction- and conflict counselling to life advisement. The offers are published in a comprehensive way (intranet, company journal, postings). Working place- and risk analyses were moreover increasingly conducted in the field of workplace design. An internal rehabilitation management is prepared currently. However, a separate budget for ergonomic furniture (e.g. height-adjustable desks, back protecting chairs) could not be arranged so far due to the tight budgetary situation. Furniture orders therefore remain largely decentralized whereby special services with low budgets and the employees working there are disadvantaged by tendency. All in all, according to the interviewees the willingness to use budgetary resources for working place equipment has increased yet, which has helped to improve the labour situation. Efforts to reduce mental work loads shall be intensified in the future.

In 2006, an inter-communal network for workplace health promotion was established between the district administration and the district’s cities in order to coordinate activities of health protection and health promotion in the various local administrations. In 2008, guiding principles for workplace health promotion were additionally developed and approved. Due to these principles the municipalities of the network commit themselves to arrange workplaces and job organisation for their employees in a health-supporting way. Network-meetings are held once per quarter and include different topics (e.g. demographic changes, non-smoker protection, mental illness and loads). Attendants of the meetings are occupational health and safety practitioners, team members of human resource- and organisational development, health care coordinators, company doctors as well as representatives of employees and disabled employees. Moreover, representatives of accident insurance and professional association are involved.

For some years the district administration additionally has been cooperating with an external academic institute which offers specific advanced trainings for older employees. These

include amongst others courses to prepare for retirement (a special guideline was developed for this course) and preparation-trainings for mentoring- resp. senior advisory functions. The latter coincidentally prepare for a possible deployment of retirees in the district administration (e.g. to support projects or to transfer know-how to successors and junior staff). In the future more offers regarding training and support for care-giving relatives shall be made.

In 2008 an all-day workshop (“Demografie-Werkstatt” / “Demography Workshop”) was held for management personnel in the company doctors’ centre in Recklinghausen in order to point out executable and supporting action for the implementation of the establishment agreement (public sector). The results of the age structure analysis and the employee survey were discussed additionally. The meeting was moderated by an external organisational consultant. For 2010 training is planned for management personnel on the subject of “healthy leadership”.

The introduction of compensation time accounts resp. work-life-accounts which is programmed in the establishment agreement (public sector) is still discussed controversially in the district administration. Although a collective agreement basis was created with the TVöD (public service) there are fears regarding potentially harmful load accumulations through extra work resp. the reallocation of working time within the employment biography.

Current projects are amongst others the development of personnel-controlling and –reporting system. A code system (absence rate, exit age, participation in human resource development- and health measures, and the like) shall enable a more systematic evaluation of human resource work as well as of qualitative and quantitative staff planning. Moreover, a project group shall develop additional human resource development measures.

The district administration has already got several awards and certificates for its activities: amongst others “European Public Sector Award 2007” by the European Institute of Public Administration, “Deutscher Unternehmenspreis Gesundheit 2008” (“German Company Award Health 2008”) by the European Network for Workplace Health Promotion and in 2009 the quality certificate “AgeCert” by the Marie-Luise and Ernst Becker Foundation.

4. Concluding reflections from the researcher

The interviewees named a participative approach, extensive public relations and the support of activities by the administration department to be important success factors for the project “Circle 50+”. However, following aspects are considered as problematic:

- Restrictions regarding public sector employment law and collective agreement as well as the statical, administration-typical established post- and career system so far aggravate personnel deployment concepts which take the development of horizontal career paths and flexible, individual skills and needs into account. Barriers additionally arise concerning the formation of age-mixed work groups.
- Due to a considerable cost pressure, high shares of older employees and thin staffing level the scopes for personnel deployment which differentiates age resp. loads are strongly restricted in some areas. Staffing freezes given by the emergency budget law aggravate processes of knowledge transfers (e.g. through learning tandems) as the replacement of functions cannot be made in time. A project for the development of a computerized knowledge transfer system could not be realised so far due to the lack of

resources.

- The current budgetary situation strongly restricts the scopes for human resource development (e.g. further trainings are granted only if they are necessary for the maintenance of service operations). Considering the increased necessity to give reasons it turns out to be problematic that the success of appropriate measures is often hard to prove through cost-benefit-analyses.
- On behalf of many executives the responsibility for human resource development and health promotion of their employees is not regarded as an integral part of the superior role. Against this background the decentralised and self-organised realisation of appropriate activities in single organisational units often turns out to be difficult
- Frequent changes of the heads of administration led to organisational restructurings and altered responsibilities in the last years which partly aggravated continuing and longer-termed human resource- and organisational developments.
- All in all, the human resource department is understaffed. Currently, the functions of human resource development and health promotion are executed by only one person. The lack of time and staff capacities can be compensated only partly by the assignment of project groups.

Contact details:

Kerstin Kiefer (special services - employee service: human resource development, workplace health promotion): kerstin.kiefer@kreis-re.de, www.kreis-recklinghausen.de

Other interviewees: Simone Kasper (manager of specialist division central tasks and organisation), Wilhelm Neurohr (chairman of works council)

Executive summary

Loewe AG (Loewe public limited company), located in Kronach/ Oberfranken (Kronach/ Upper Franconia), is a company in electronics industry which produces high quality home entertainment technology. In line with the advisory- and transfer project „Mit Erfahrung Zukunft meistern - wettbewerbsfähig mit älteren Mitarbeitern“ (“Coping future challenges with experience – being competitive with older employees”) an extensive catalogue of demography-oriented personnel measures was developed and transferred into practice. For its activities the company amongst others got the prize “AARP Best Employer Award” granted by the American Association of Retired Persons.

1. Organisational background

Criteria	Parameter value
Size (employees)	- Large (940 workers in Germany)
Sector	- Production (electrical engineering) - Private
Work council	- Yes
Business volume	- turnover of 324 million € - earnings before interest and taxes of 13.5 million € - a balance sheet total of 234 million €

Loewe AG is a company in the electronic industry which was founded 1923 in Berlin. Location of headquarters and production site has been in Kronach/ Oberfranken (Upper Franconia in federal state of Bavaria) since 1948. Moreover, there exists a research- and development centre in Hannover (federal state of Lower Saxony). In addition, the company maintains distribution partnerships on international level. Own subsidiaries for distribution and service exist in the Benelux countries, in France, Italy, Austria and Great Britain.

The company develops, produces and distributes products and systems in the field of home entertainment- and communication technology, basically in form of television sets and home entertainment systems in premium segment. In this context, central elements of the pursued brand- and product strategy are high product quality, innovative technology, exclusive design as well as customized design- and equipment options. The most important sales market for Loewe products is Germany, while about half of the turnover is generated on international markets. An important business-strategic objective currently is to strengthen the company's position in relevant European markets.

Since 1999 Loewe has been a listed public limited company. The annual report 2009 showed a turnover of 324 million Euros, earnings before interest and taxes of 13.5 million Euros and a balance sheet total of 234 million Euros. Current commercial- and financial crises have led to a weaker market development, reduced production and accordingly with a decline in turnover and earnings (about 50 million Euros respectively about 15 million Euros compared

to the previous year 2008). The company reacted short-termed on this development with various measures to adapt production capacity (amongst others reductions of working time in form of unpaid block days, short-time work). Overall, it is assumed that the market for LCD-TV-sets will continue to grow during the next years because of a high replacement demand and an increasing possession of more than one TV-set.

The company currently employs about 1040 people, thereof about 940 in Germany. The shares of industrial workers and women are each at 38 %. Part-time quota is about 19 %, labour turnover rate is about 0.40 %, vocational training quota is about 8 %, average job tenure is about 18 years, average staff age is about 43 years, the share of employees over 50 years is about 31 %. The company is member of the Bavarian Employers' Association for the metal industry; collective bargaining partner is the trade union IG-Metall (IG Metal = metal workers' union). Since 2009 the collective framework wage agreement (ERA-TV) for metal- and electrical industry has been valid, which constitutes a standardised remuneration system for industrial workers and office employees. The interests of the staff are represented by a works committee. The interviewees describe internal labour relations as constructive and confident: maintenance and extension of workplaces, confidence and mutual respect as well as a participative management are regarded as important elements of the company's Corporate Responsibility Philosophy. When it came to an existence-threatening critical situation due to changed demands for TV-sets in 2003, the company concluded an extraordinary restructuring agreement with IG Metal and works committee in order to reduce personnel costs and to secure workplaces. The contract stipulated that the employees including management personnel company-wide agree to the waiving of salary components in order to avoid further staff reduction. In return the repayment of deferred salaries should be made with an interest rate of 25 % in case of positive business development. As restructuring was successful the agreed compensation payment was made in 2007. Additionally, employees were paid out a success bonus. As planned, the company returned to the industry-wide multi-employer agreement of IG Metall in 2008.

2. Age management approach

Criteria	Parameter value
Target groups	- pilot project at one assembly line shall be later extended to other production workers
Type of measure	- Job-recruitment - Training - Work and working time organisation - Health promotion and ergonomics and job design
Social partners involved	- ?
Scope of measure	- Overarching

Loewe's current personnel situation is characterised by following problems:

- Personnel reductions through dismissals, early retirement and hiring freeze which were owed to the crisis as well as long job tenures have led to a raise of average staff age. At the same time the intensity of labour has increased due to the low level of staff coverage.

- In the production field work is mainly done according to the principle of clock-dependent flow production. Especially for older employees the high working speed and corresponding stress loads turn out to be problematic. Rationalisation-, automation- and outsourcing-processes of the past years thereby have partly led to a reduction of physically stressful operations. But at the same time application areas for employees with inferior performance have disappeared. Moreover, reducing the vertical range of manufacture through outsourcing affected organisational units and pre-fabrication stages has resulted in repetitive job design: the share of bought-in material is around 80 %, work in production is basically limited to mounting, final assembly and quality control. As due to piece-work salary is dependent on the attained number of pieces there often arises a high social pressure on employees with inferior performance within the workgroups.
- The company is located in a structurally weak region which is highly affected by demographic changes and emigration processes. Especially the recruitment of academically trained personnel for expert- and management functions proves to be difficult due to the missing metropolitan environment. This is aggravated by decreasing numbers of graduates in technical studies.

Against this background current fields of action and topics of human resource management are the areas of recruitment, staff development, health promotion and labour organisation. Activities regarding recruitment marketing and employer branding are amongst others various co-operations with universities and network activities in schools and industry. In line with the federal project "Perspektive 50plus" ("Perspective 50plus") performed by the Federal Ministry of Labour and Social Affairs the company additionally participates in the Employment Pact "50+ in Oberfranken" ("50+ in Upper Franconia) which aims at an improvement of employment opportunities for older employees. Furthermore skilled labour needs shall be ensured by a high vocational training quota. Thereby trade school offers which are embedded in a dual vocational education and training system are supported by internal courses and training offers as it was realised that apprentices show knowledge- and competence deficits in basic skills like arithmetic, spelling, etc..

In the field of human resource development the company strengthened its activities to build up intercultural competences in view of increasing internationalisation (e.g. company-wide language trainings). Moreover, specific software-trainings for development-, quality- and metrology sectors were created in co-operation with universities and were offered to all age groups of employees. Since 2008 an extra-occupational trainee-programme has been existing for new employees, including amongst others the topics brand positioning, project management and presentation techniques. Various trainings for management personnel as well as qualifications for advancement are additionally offered which are also accessible for production staff (e.g. business administrator trainings). Besides, there are various career options open to employees in the company (management-, specialist-, project careers). A topic of regular appraisal interviews is therefore the determination of qualification requirements and development perspectives.

In order to reduce loads in production fields various tools were implemented in the past (amongst others robots for heavy-weight lifting- und turning operations, packaging machines, automatic control stations instead of hand control stations). In 2009 a new final assembly line was put into operation for a flexible and at the same time efficient production of large-sized TV-sets. Thereby ergonomic design aspects were considered in a special way (amongst

others height-adjustable working surfaces and all around walkable work places to avoid unilateral postures und long grab distances, lifting aids, optimisation of the indoor climate through panel radiators, improved light conditions through large windows). The insights won with the conception of the pilot line shall successively be transferred to further production fields. Via a health circle recently a load analysis was conducted which based on a questionnaire-supported employee survey. Hereby further indications shall be delivered for the development of health-oriented offers and approaches regarding labour organisation which consider specific load profiles at work places.

Moreover, a wide range of behavioural health promotion measures are offered. These include e.g. preventive examinations, workshops, courses and job-related trainings. Further offers are amongst others sportive recreation activities, nutrition- and cooking courses. For this purpose the company cooperates with health insurances, various fitness facilities, swimming baths and sports clubs. The company appreciates to include employees when structuring offers and implementing measures in order to increase interest in attending and motivation. The interviewee pointed out that additionally structure analyses regarding absenteeism are conducted in cooperation with a health insurance. There also exists an internal rehabilitation management which is regulated by a works agreement. The various activities are parts of a comprehensive health care management which is coordinated by three persons.

A flexible working time system is conducted within the company (different part-time options, flex time regulations, partial retirement, working-time accounts) which also considers time interests of employees. Moreover, employees can do teleworking in enterprise areas which admit this organisationally. Parents are supported in the arrangement of child care in order to improve the compatibility of family- and work commitments. In line with the staff catering a take away service for meals is offered; currently a housekeeping service is in planning. Furthermore, an information centre for care-giving employees was implemented in 2009.

3. Current Practice and how it has evolved

Criteria	Parameter value
Status of initiative	- Continuation
Criteria	Parameter value
Target groups	- pilot groups within production sector - extension to non-tariff employees (management a. specialist personnel)
Type of measure	- Training - Work and working time organisation - Health promotion and ergonomics and job design - other: leadership, age structure analyses
Social partners involved	- Yes - No
Scope of measure	- Age-specific - Overarching

In 2005 the company participated in the advisory- and transfer project „Mit Erfahrung Zukunft meistern - wettbewerbsfähig mit älteren Mitarbeitern“ (“Coping future challenges with experience – being competitive with older employees”). This was a cooperation project by the “Forschungsinstitut Betriebliche Bildung” (“Research Institute for Vocational Education and Training”) together with Bavarian Employers’ Associations. The project was subsidised by the European Social Fund and run for three years. The objective of the project was to support Bavarian enterprises in the development and implementation of a demography-sensitive human resource- and labour policy. In addition to an information- and sensitisation campaign exemplary approaches of arrangements shall be realised in ten Bavarian enterprises of metal- and electrical industry. First, company checks were conducted in the pilot companies including analyses with regard to age structure, business strategy, labour market and manpower requirement as well as the review and evaluation of existing staff development instruments. Subsequently, on this basis a concept for action with appropriate measures and ways of proceeding was developed and put into practice. The action taken was coordinated in each case by a control group of company representatives in cooperation with external advisors and trainers. Various workshops and trainings for management personnel and employees flanked the project (e.g. trainings to conduct appraisal interviews, offers to analyse occupational situations).

Loewe’s company check showed amongst others that employees over 50 years of age participate in human resource development measures to a lesser extent and that in future increasing absenteeism is to be expected due to a rising age average of the staff. The results of the situation analysis therefore led to the determination of the fields of action “management personnel development”, “competence management”, “labour organisation” and “health promotion” which should be further specified in line with the “project 67”. Hereby a management personnel circle (“Loewe management shop floor”) served as steering committee which should conduct the development and execution of the concepts. In form of workshops the management personnel were additionally sensitised for the topics of demographic changes and ageing workforces (management personnel workshop “competitive with ageing workforces”). Moreover, management personnel were trained to conduct staff development interviews and concepts were compiled in the fields of human resource development, leadership with target agreement systems, competence- and knowledge management.

One of the measures realised in the „project 67“ is the development of a strategic competence management which aligns future competence requirements connected with new business fields, products, service features, production technologies, etc. with current competence profiles of employees. The objective is to identify strategic qualification shortages and requirements regarding human resource- and organisation development with this measure.

The process stipulates that the business strategy is operationalised in a stepwise way for competence fields on sector-, department-, function- resp. job-levels. Then required and given competences (specialist, methodological, social, personal, leadership skills) are registered each in a competence matrix which eventually serves as information basis amongst others for appraisal interviews, target agreements, qualification-, career-, human resource allocation- and succession plans and knowledge management. Beside market changes and technological progress also demographic development processes, such as staff

ageing and skilled workers shortage, are considered in the future projection. After the completion of a test phase the competence management system currently is launched for non-tariff employees (management- and specialist personnel). If the implementation turns out to be successful it is intended to include further groups of employees.

Another central element of the project was the development and implementation of measures regarding job structuring in pilot groups within production sector. Thus a job rotation concept was developed for the final assembly in order to compensate unbalanced physical loads, poor diversity of tasks as well as the lack of learning impulses and at the same time to increase flexible staff deployment. Moreover, job enrichment measures were tested in the manual assembly, in which employees should fulfil additional tasks regarding work planning in order to enrich the job profile. Both measures were flanked by workshops for employees and management personnel as well as by workplace analyses and advisory services (ergonomic labour organisation, health-friendly workmanship, corrective gymnastic exercises, and so on). However, the job structuring concepts weren't continued in further consequence for various reasons: only minor differences of load profiles at workplaces, too large work groups, too high qualification requirements, losses of piece numbers, high costs connected with a basic reorganisation of work- and production flows as well as missing willingness for job rotation on employees' side.

Furthermore, existing initiatives for health promotion were enlarged and realigned. In line with the programme "Fit mit Loewe" ("fit with Loewe") the objectives were amongst others to involve employees in development and implementation of measures, to put more emphasis on team orientation and also to point out the "fun factor" of the offers developed in order to attract an interest to participate. It was also intended that the broader social environment of employees (relatives, friends) should be addressed. In this context health promotion offers are amongst others Nordic Walking- and gym-exercise groups, the participation in running events, skiing weekends and cooking courses. An incentive system is currently in planning which shall reward the participation in the events offered respectively health-conscious behaviour ("Loewe Fitness Card").

The company has been awarded several times for its activities, e.g. with the prize "Unternehmen mit Weitblick" ("enterprise with foresight") by the Federal Ministry of Labour and Social Affairs (2006), with the "Zertifikat für Nachwuchsförderung" ("certificate for junior staff development") by the Federal Employment Agency (2006), with the BGF-Award of AOK (= German public health insurance company) (2007) as well as with the "AARP Best Employer Award 2008" by the American Association of Retired Persons (2008). Moreover, the Stiftung Warentest (= leading German consumer safety group) classified the company as exemplary in line with a review of "Corporate Social Responsibility" within electronics industry.

4. Concluding reflections from the researcher

„Project 67“ is regarded as generally successful by the interviewees although no systematic programme evaluation has been conducted. Thereby, positive effects are also seen regarding the improvement of the company's image. The project is additionally attributed to have an important initialising function for a general change in awareness and further follow-up activities. The company currently participates in a three year termed research- and

transfer project: „WertFlex: Wertebasiert flexibel – Chancen des Human-Ressourcen-Managements zum Erhalt und Ausbau transformationaler Innovationskultur“ (“ValueFlex: value-based flexible – chances of human resources management to maintain and enlarge transformational innovation culture”). The objective of the project is to promote a value- and confidence-based innovation culture. In this context also questions are explored regarding possible demographic synergy potentials and intergenerational learning opportunities. Considering the age-critical load situation need for action is seen especially in production field. Here the works committee hopes that along with a larger utilization of production capacities an additional shift can be implemented for older employees in which less piece numbers are targeted. Further labour organisation- and health promotion measures shall be developed in line with the participation-oriented pilot project “Gesundheitsförderung in der Endmontage” (“health promotion at final assembly”) which is currently conducted. Moreover, for some time Loewe has been participating in the network “Ältere lernen in der Fertigung” (“older employees learn in production”). On this network platform master craftsmen and shift leaders from different companies discuss approaches regarding personnel deployment and labour organisation for older employees. Against the background of flat hierarchies and increasing importance of project work alternative career models shall be expanded and a greater permeability between management-, project- and specialist careers shall be established. Thus on one hand attractive fields of application and chances of advancement shall be created for qualified skilled workers. On the other hand job rotation shall be possible without losing status and reputation (e.g. consulting- or project leading functions).

Contact details:

Werner Kotschenreuther, human resource manager
(E-Mail: werner.kotschenreuther@loewe.de)

Other interviewees:

Birgit Wich (personnel development), Günter Oßwald (chairman of works council)

www.loewe.de

CASE 5: Bitburger Braugruppe

Executive summary

Bitburger Braugruppe is a leading German brewery group, consisting of five companies. In 2007 a participation-orientated demography-project was started on initiative and under leadership of human resource management and works committee at the company location Bitburg. With this venture the company joined in the model- and transfer project “Alternativen der Personalpolitik mit alternden Belegschaften – Projekt Alter” (“Alternatives for personnel policy with an ageing workforce – project age”). Within the project, various concepts were developed and implemented in the fields of job design, health promotion and further training. The task force emanating from the project was additionally institutionalised and serves as an idea pool which shall continuously develop concepts and measures in the fields of action “future-oriented, age-based job design”, “lifelong learning”, “health promotion management” and “organisation of working time and early retirement concepts”.

1. Organisational background

Metadata:

Criteria	Parameter value
Size (employees)	- Large (1683)
Sector	- Production
Work council	- Yes
Business volume	- 763 Mio. Euro € (2009)

Bitburger Braugruppe is a brewery-group, consisting of five companies. Holding company is the Bitburger Holding GmbH (= Limited Liability Company). Parent company is the Bitburger Brauerei (Bitburger Brewery), founded in 1817 and located in Bitburg (federal state of Rhineland-Palatinate). The company is family-owned at 100 %. In 2009, Bitburger Braugruppe in combination was the third largest brewery in Germany. The company is German market leader in draught beer with its product “Bitburger Premium Pils”. The company group pursues a multi-brand strategy which combines its brands with national and regional orientation and focuses on the premium segment of the German beer market. The export strategy concentrates, apart from the traditional markets of neighbouring Belgium and Luxembourg, in particular on the top tourist destinations of the German population (Spain, Italy, Austria). Outside of Europe, the company’s efforts regarding export concentrate particularly on the USA, Japan, China and Australia. Currently, Bitburger beer is obtainable in 56 countries and in about 50,000 gastronomic establishments. There are furthermore about 900 company representations in Germany and abroad.

The brewery group generated a gross sales revenue of 763 million Euros, the total brewing was 7.3 millions hl. On overall, the situation of the German beer market is currently marked by excess capacities within the branch (about three quarters of all breweries in the EU are situated in Germany), increases in productivity, processes of concentration in form of buy-outs and mergers, decreasing numbers of employees, increases in raw material and energy

prices, growing variety of products (particularly mixed beverages) and a high competitive- and price pressure (especially caused by food retailing resp. discounters). Already for several years, beer consumption per capita has been declining. All in all, faced with this situation the Bitburger Braugruppe could hold its ground comparatively well despite of the decline in market volume and the problematic macroeconomic environment.

Bitburger Braugruppe employs currently 1,683 persons. The share of industrial workers is 41 %, women quota 20.1 %, part-time quota 7.37 %, labour turnover through voluntary terminations 0.7 %. In the last years personnel adjustments were necessary against the background of increases in productivity and declines in production. These adjustments were realised to a large extent by natural labour turnover, by early retirement programmes and by a reduction of new engagements. During the time before merging, the bought-in breweries passed through partly severe processes of restructuring and downsizing which had side effects on internal age structures. Currently, the average age in the brewery group is 45.8 years, the share of employees aged over 50 years is 35.1 % and the average job tenure is 19.1 years.

The employees of the company group are organised in works committees: there is a works committee at each company location and additionally there exists a general works committee with ten members. Collective bargaining partner is the trade union Nahrung-Genuss-Gaststätten – NGG (food and restaurant union). The interviewees described internal labour relations as constructive and confident. Participation and transparency are moreover encouraged in an active way by annual appraisal interviews, by regular employee surveys and “idea days” as well as by an intranet accessible for all employees. An open exchange of views and constructive criticism are regarded as part of the corporate culture.

2. Age management approach

The old-established family company Bitburger Braugruppe is characterised by a corporate culture which is based on social partnership and ethic welfare. The good employer image of the company originates from an employee-oriented human resource management, a high security of employment and manifold internal social benefits (already in the 1920ties, an own employee pension and an employee benefit society were established). The corporate philosophy codified in 2010 and obligatory for all locations fixes the following: “We appreciate and respect every single employee as individual character and as part of our brewery family”. Furthermore it is stated: “Every employee can expect that his/her work is valued and respected and he/she is given the possibility to identify with his/her work”. Thereby, employees shall be enabled to unfold and further develop their skills. It is specified in the company’s management principles: “Who leads employees has to act as a role model. Critical faculties, open communication and a team-oriented and partner-like management style belong to the attributes of our managers as well as personal credibility and confidence in the skills of employees. Management instruments, such as appraisal- and target agreement interviews, support a professional management and communication process. Employees are to be involved as far as possible in the target setting concerning their task areas”.

Professionally skilled and active employees on all hierarchical and function levels are regarded as important precondition for the business success. Human resource development

is integrated in the quality management system of the company and is regulated by related process instructions. Moreover, this subject is part of the management principles and instruments and of executive trainings. Substantial basis of human resource work are qualification demand analyses which are conducted regularly in line with appraisal and target agreement interviews. Success and acceptance of qualification measures are additionally reviewed through regular employee surveys, seminar evaluations and transfer ratings (transfer from acquired knowledge to vocational practice). Only in the context of internal trainings, about 200 courses are organised on average yearly with about 1,800 participants. Apart from specialised trainings, the courses offered also include innovative measures for personnel development. These are e.g. outdoor trainings following the model of experiential education which shall encourage cooperation, interaction and leadership behaviour as well as the adaptability of employees. Qualification measures are principally offered to all age and occupational groups.

Furthermore, the company is active in the training of junior staff. The brewery in Bitburg is one of the biggest apprenticing companies in the region: 15 new apprentices are on average hired every year which is more than the company needs (around one third of the apprentices are offered a permanent position after the apprenticeship). Currently, there are around 50 apprentices employed in the company who are trained in 13 administrative and industrial/technical vocational fields. In line with the training concept, participants are taught in small groups which take into consideration individual strengths and aptitudes. Hereby, professionally experienced employees pass on their know-how to apprentices. For its apprenticing commitment, Bitburger Brauerei was certificated as "Ausgezeichneter Ausbildungsbetrieb" ("Excellent apprenticing company") by the Chamber of Industry and Commerce Trier in 2009.

Activities in the fields of recruitment marketing and employer positioning are amongst others manifold network activities in schools and industry as well as participation in exchange forums and university projects (e.g. lectures, presence at university careers fairs, offers for traineeships and theses). In its regional environment, the company promotes local societies and charitable initiatives and is active in regional marketing. By the end of 2009 Bitburger Braugruppe was awarded the "Corporate Citizenship" Prize for its civic commitment by the federal state of Rhineland-Palatinate.

The company takes various efforts regarding health protection and health promotion in order to maintain the workability of its employees in the long run. Preventive measures have been offered already for many years (influenza virus vaccinations at no charge, health protection days on various topics which are offered in cooperation with health insurances). Additionally, there are various company sports and seminar offers (a. o., gymnastics and healthy nutrition courses, information events on occupational safety). In line with staff catering it is paid attention to a range of meals that is optimised under consideration of nutritional value. Moreover, the company has employed an own social counsellor already for 15 years who at the same time has the function of an in-house paramedic. Activities in the fields of occupational safety and job design are conducted in form of regular workplace analyses and consequent optimisations (amongst others through ergonomic compensation measures). In manufacturing departments, the shares of heavy physical workloads and of work in wet and cold rooms could be reduced by the introduction of automatic control systems in the last years. By the end of 2008, a new bottling plant was put into operation on the site of the brewery in Bitburg, considering in particular both aspects regarding efficiency and hygiene

and environment and occupational safety. Thus, amongst others a complete renovation of the floor was carried through in order to increase the skid resistance. Lighting, air supply and noise protection were optimised in addition. Also at other locations, the company invested in technical equipment resp. modernisation of production plants. In office departments, height-adjustable desks at all workplaces enable an optimal adaptation of the height of working surfaces to various body heights. In this way it is possible to work as well in a standing as also in a sitting position which supports movement dynamics.

Bitburger Braugruppe encourages the compatibility of family and work in particular through a flexible working time model. Already several years ago a working time regulation on mutual trust was established in the entire company, which guarantees a relative free individual time management (however, the regulation is not valid for employees in the industrial-technical field as there an hourly wage is paid because of wage agreement regulations and tax-free remuneration components – e.g. regarding work on Sundays, public holidays and on nights – require timekeeping). There are besides diverse options for part-time employment. In addition, employees with family commitments can do alternate teleworking in enterprise areas which admit this organisationally. Basis for this is a works agreement which has existed since 2003.

3. Current practice and how it has evolved

Metadata:

Criteria	Parameter value
Target groups	<ul style="list-style-type: none"> - Qualified - Persons with health problems
Type of measure	<ul style="list-style-type: none"> - Training - Work and working time organisation - Health promotion and ergonomics and job design - Changing attitudes
Social partners involved	<ul style="list-style-type: none"> - No
Scope of measure	<ul style="list-style-type: none"> - Age-specific - Overarching

Metadata:

Criteria	Parameter value
Status of initiative	<ul style="list-style-type: none"> - Continuation

In 2007 Bitburger Braugruppe started the demography project “Herausforderung Zukunft” (“Future as Challenge“) on initiative and under conduction of human resource management and works committee at the Bitburg location. The company participated with this activity in the biennial model- and transfer project “Alternativen der Personalpolitik mit alternden Belegschaften – Projekt Alter“ (“Alternatives for personnel policy with an ageing workforce – project age“) which was promoted by the Rhineland-Palatinate Ministry of Labour, Social Affairs, Health, Family and Women from 2006 to 2008 and conducted by an union-related consultancy (Counselling Centre for Technological Issues Rhineland-Palatinate). The project

mainly aimed at the support of small and medium-sized enterprises in the development of instruments for a far-sighted handling concerning the consequences of demographic changes.

Following determinants motivated the company to participate in the model project and to establish an internal work group which consists of team members from human resource department and works committee:

- Long job tenures, decreases in new engagements of younger employees due to increases in productivity and declines in production as well as the buy-outs of several breweries in part with strongly age-centred staff led at Bitburger Braugruppe overall to an increase of the average age and the share of older employees in the past years.
- Some labour fields in production and logistic show age-critical characteristics (e.g. high demands on concentration and responsiveness, musculoskeletal loads through vibrations and unfavourable postures, night and shift work). Intensity of labour and complexity of tasks and corresponding stress loads all in all increased. At the same time rationalisation and outsourcing processes led to a decrease of load-reduced adapted workplaces.
- In the past, early retirement models which were subsidised by government and company enabled most employees of the brewery group to retire far beneath the regular retirement age. Due to the raising of statutory retirement ages and to the expiration of part-time retirement regulations enterprises and employees in the future will have to adapt to considerably longer durations of employment. Therefore, all parties are increasingly faced with the question for appropriate concepts to maintain and support the workability of personnel concerning health-, qualification- and motivation-related performance potentials.
- In the course of a reform regarding managerial and organisational structures in 2006 which included a. o. the centralisation of the administration, the human resource department in Bitburg was given a stronger cross-locational and strategic direction. Compared with former situations, the increasing competitive pressure in brewery industry and a dynamic market environment now necessitate a far-sighted human resource work which anticipates future development trends and at the same time prepares employees for new types of competence requirements (e.g. regarding technical/organisational changes or altering customer needs).
- The company has not been confronted with staff shortage so far because of both its good image as employer and its high vocational training quota. Nevertheless, declining numbers of applicants for some years indicate a decreasing recruitment potential for specialised and management personnel in the rural region. To this situation, the competition for manpower with other companies in the surrounding (amongst others also in nearby Luxembourg) has to be added. Moreover, a higher human resource requirement is expected by 2015 as age groups which are numerically strongly represented will reach retirement age at that time.

In the course of the project work, first the current situation in the company and the state of personnel management activities (health management, job design, staff development, etc.) were analysed through various instruments. Then, possible future scenarios and objectives were developed under consideration of market and organisational changes and from this, priority fields of action were derived for further human resource work. The approach

included apart from age structure analyses, employee surveys and expert interviews also two area-specific “future workshops” which were conducted under the moderation of external organisational consultants with employees and executives of the bottling and sales departments. Both fields were chosen because the largest employee groups are represented there and the average age is exceptionally high. Moreover, those fields of activity have been subject to considerable changes (e.g. technology, customer requirements). Both workshops centred around two questions: “How do you describe the work in your field today and which future trends do you see?” and “How could the work be designed in your field in the future?” The participants answered those questions as follows:

- On the part of employees from the field service of the catering sales department, especially stress loads were classified as problematic (extensive driving activity, emotion and interaction work, high pressure to acquire resp. to succeed). Changes of the job profile are additionally expected in the future (e.g. in direction of event management). Improvement suggestions were named in form of stress management trainings and courses regarding time and self management. In addition, the engagement of junior staff and formation of learning tandems were suggested in order to organise the transfer of knowledge between older and younger sales representatives. Through mixed-age teams, a stronger age-differentiated allocation of tasks shall moreover be enabled (e.g. splitting of sales and administrative tasks).
- Industrial/technical employees working in the bottling sector see themselves above all confronted with a growing complexity of tasks. During the last years, technology and automation processes led to an increase of computer-supported monitoring activities which are accompanied by a heavy pressure to bear responsibility, as already minor mistakes can cause major economic damage. Corresponding steering and control activities are aggravated by software and screen ergonomics which often miss age orientation (e.g. small font sizes on touchscreens). Moreover, requirements regarding flexible human resource allocation and qualification increased (thus, e.g. it is necessary that operating processes can be mastered at several plants due to a greater variety of products). Physical loads (amongst others work in prolonged standing position and stoop posture, impacts on the climate) and working time loads (night and shift work) are to be added. Staff reductions besides led to an increased intensity of labour. Improvement suggestions named by the participants were amongst others concepts for an ability-matched resp. age-differentiated staff allocation, possibilities to quit the three-shift-system as well as an enlargement of health promotion and qualification offers and adaptation to employees’ needs regarding working time resp. shift working time.

On the basis of various analyses, consequently four fields of action were defined for which continuous concepts and measures shall be worked out in future: *“future- and age-oriented labour organisation”, “lifelong learning”, “health management”, “organisation of working time and early retirement concepts”*. The task force resulting from the project was institutionalised for this purpose and acts as “idea pool” and steering committee. Various measures could already be realised, taking into account also suggestions from the workshop:

- In the field of sales the existing health promotion programme was extended with stress prevention and stress management trainings. Moreover, several junior employees were engaged who got an introductory training in line with a trainee programme. Tandem models are tested currently in single pilot areas of the field service, in which older and younger sales representatives cooperate and thereby can share up-coming among

themselves in lines with individual abilities.

- In the field of production and logistics, various job enlargement and rotation concepts were introduced, which shall allow load changes and increase flexible personnel allocation (e.g. change between bottling, labelling, sorting of empties; in logistics field: change between forklift operating and shipping tasks resp. forklift operating in various application areas, e.g. in the warehouse or at truck loading). Furthermore, forklifts were equipped with cameras in order to avoid unfavourable body postures and to reduce accident risks. Through special suspension seats and by using solid (instead of pneumatic) tyres, the drivers are moreover exposed to vibrations to a smaller extent. An optimisation of the existing shift system is planned to reduce load caused by night work. For this purpose, the company cooperates with a research institute of work science. In the field of further training, new qualification measures were designed which are specified in particular for the needs of employees who are unaccustomed to learning. Thus, e.g. shorter learning modules and workplace-related resp. job-integrated trainings are offered instead of all-day seminars.
- For employees at office workplaces, ergotherapeutical care is offered in cooperation with a local practice for physiotherapy ("Bit-Fit"). The offer includes massages at the workplace as well as advice for gymnastical complementary exercises, optimal sitting postures and others. At the same time, this service shall encourage employees to exercise recreational sport also in their spare time and to make use of the practice offers (currently used by about 20 % of the involved employees). It is planned to evaluate long-term effects of this measure.
- At the beginning of 2010 and in line with the pension plan a bridging pension model ("Bitburger Übergangsrente" = "Bitburger Bridging Pension") was introduced which shall enable health-impaired employees to retire earlier. The model is addressed to employees aged over 55 years and is subject to certain criteria: amongst others medical evaluation, job tenure and heaviness of workloads are taken into consideration. Three forms of working time reductions are possible with related remuneration variations within a ten-year-time period (70/30, 50/50, 60/40).
- Various activities target at the creation of an awareness for problems in employees and managers. The work of the project group is flanked by comprehensive and continuous public relations measures (e.g. regular articles about project activities and demography topics in the staff magazine, in the intranet, at works meetings, at strategy meetings between management and divisional directors, and so on). A symposium "work and health" was organised to inform management personnel amongst others about workloads, legal framework, internal supporting services. Moreover, the guidelines for the conduction of appraisal interviews were enlarged (e.g. the subject of "family and occupation" was added).
- It is planned to implement an internal reintegration management. A related works agreement is currently in preparation. Additionally, activities to encourage the compatibility of family and work shall be enlarged. In discussion are a. o. the cooperation with a family service which helps parents with child care, and the development of a 'stay in touch' programme for employees on parental leave resp. care time. The specification of the offers shall be worked out on basis of the results of an employee survey, conducted via company intranet.

Currently the Bitburger Braugruppe participates together with eleven other companies in the model and transfer project “Strategie für die Zukunft - Lebensphasenorientierte Personalpolitik” (“Strategy for the future - life course-oriented personnel policy”). The project is conducted by the “Institut für Beschäftigung und Employability” – IBE (“Institute for Employment and Employability”) at the University of Applied Sciences of Ludwigshafen and is financially supported by state funds of the Rhineland-Palatinate Ministry for Economy, Transport, Agriculture and Viticulture (MWVLW) and EU funds of the European Regional Development Fund (EFRE). The model companies which were chosen in line with a competition by an independent jury are supported by specifically trained process guides in respect of the development and implementation of life-course-oriented personnel strategies and moreover they are scientifically monitored during the one-year project phase (2009-2010). Subsequently, the developed instruments, measures and implementation strategies shall be evaluated and made accessible for other companies.

4. Concluding reflections from the researcher

The interviewees point out that basic success factors of the project “Herausforderung Zukunft” (“Future as Challenge”) are to be seen both in the cooperative and pragmatic teamwork of employees’ representation and human resource department and in the support by the management. Thereby, the human resource manager and the chairman of the works council are the relevant promoters of activities while using their privileged access to information channels and decision makers in order to persuade continuously both management and staff.

The biggest challenge and a central objective of the work group are seen in the generation of an adequate awareness for problems in the company. For example, the long-standing early retirement practice led to the effect that many employees developed an “early retirement mentality” which became manifest with increasing age in a reduction of the willingness for further trainings and changes. In this context, further need for action is also seen in the encouragement of individual health consciousness and behaviour and of individual initiative regarding retirement arrangements. On the other hand, it is pointed out the need that also managing personnel is stipulated to prepare their employees for a longer working life (e.g. through esteeming leadership, age- resp. ability-related human resource allocation or support regarding further training). Here, it turns out to be difficult to overcome reservations on part of the management due to the fact that the success of investments in human resource measures often is visible only in the long run and is hardly to quantify resp. to attribute causally.

Furthermore, the interviewees refer to structural constraints. The scopes for further job structuring measures (e.g. team work) are judged all in all limited due to the thin staffing level as well as to economic- and season-correlated fluctuations in production. This applies similarly to the release of older employees from night shifts or to the assignment at load-reduced workplaces. Additionally, ergonomic and age-related design aspects are not enough considered so far (e.g. steep and narrow cat ladders) according to the judgement of the respondents on side of plant manufacturers.

Contact details:

Theo Scholtes, Manager Human Resources and Central Services of Bitburger Braugruppe:
Theo.Scholtes@bitburger-braugruppe.de

Other interviewees: Wolfgang Lorse (chairman of works council at Bitburger and chairman of group works council), Joachim Otten (manager of personnel development and administration division)

www.bitburger.de

CASE 6: Anton Plenkens Solarteuer, Dachdecker- und Klempnermeister (Meerbusch near Düsseldorf)

Summary

Measures at Anton Plenkens have existed already since the end of the 1990s, as they were incited by the Demotrans project (Public Relations and Marketing Strategy 'Demographic Change'). Basically, they consist of a change of tasks and job enrichment (alteration of construction and office tasks) and of trainings in IT technology for workers above 40 in order to make them able to work until retirement.

1. Organisational background

Criteria	Parameter value
Size (employees)	- Small (6 persons incl. AP)
Sector	- Construction - Private
Work council	- No
Business volume	- 500 000 €

The company "Anton Plenkens Solarteuer, Dachdecker- und Klempnermeister" (Anton Plenkens Solar Installer, Master Roofer and Master Plumber) was founded in 1952 by the father of the current director who has led it until his death in 1977. Until 1978, the wife of the deceased took over the management while the current director has been finishing his master craftsman degree. As the firm is a non-incorporated firm, it was formally closed after the death of the former owner, but informally, it celebrated 50th anniversary in 2002.

The number of employees (without the director) has been altering between 1 and 5 persons (the current number). 4 workers are journeymen (trained workers) after 3 years of vocational blue-collar education, one of them has a master craftsman degree, and one is an apprentice. Since about 1996, the company has not employed any workers without formal education. The workers have between 1 and 25 years tenure. The 4 journeymen have completed their occupational education in another company, although recruitment of such workers is always tricky as the firm highly values social skills in relations with customers. The journeymen are in their forties, the director is 51. All workers are male, there is no person with foreign origin currently employed at the firm.

The firm is only sporadically affected by personnel shortages. In such cases, the firm leases workers from another roofing company. Construction is affected by decrease of work between December and March. Financial compensation is then offered the „saisonal short work allowance“ from the Federal Employment Agency as well as an allowance from the Social Fund of the Roofing Craft which covers salary for 56 hours per month.

The turnover is constantly 0.5 million €. Since 1998, the firm is active in the field of regenerative energy (solar panels) which however amounts only to 10% of business volume. Work is performed in a radius of 50 Km and the firm has no plans for expansion. The spectrum of jobs offered cover roofing jobs, energetic reconstruction of buildings, sound

protection measures on the facades and the roof, isolation of base wall, sealing of flat roofs, the development and construction of solar panels, as well as small jobs and repairs. The work is not performed on subcontractor basis but ready-for-use and, if needed, complemented with external services e.g. of electricians. Work is on purpose not constricted to blue-collar tasks but covers also jobs of high quality standards, such as planning and consulting which makes the company exceptional when compared to others. Work on the solar panels involves also precision work which, according to the director, can not be just performed by any roofer – precisely measuring PVC film, electric tasks like cutting and connecting solar wires, measuring currents and open-circuit voltage. The acquisition of new customers is mostly informal – employees are approached on construction sites and answer the inquiries. A good diction is needed for this. Customers praise the employees as they are *“always friendly and obliging and do not leave rubbish behind”*.

The roofing craft is generally known for a high risk of accidents which has however decreased in the last decades due to the more use of scaffolds. If a roofer falls down he falls on the scaffold or a net and not onto the floor. Working under time pressure bears the largest risk of accidents as the employees are then less careful.

The very small firm has by nature no works council. It is however a member of an employers’ association and is affected by collective agreements, which however are irrelevant with respect to the subject in question.

Already at the beginning of the interview, the director pointed out the values of his employees. The productivity is lower due to the higher average age, when compared to other roofing companies, but social competence (greeting customers, shaking hands, giving information in a friendly way) is better due to long tenure. This allows the director to cede some tasks – agreements with customers, inquiries with suppliers – unto his employees, which brings about a *“win-win situation”* for both parties.

2. Original measure

Criteria	Parameter value
Target groups	- Qualified workers
Type of measure	- Training - Work and working time organisation - Health promotion and ergonomics and job design - Changing attitudes
Social partners involved	- No
Scope of measure	- Age-specific (starting with those ‘mid-aged’)

The interest in age management measures arose in the 1990s due to four factors:

- 1) the Demotrans project, which was run by the Federal Ministry for Education and Research and the Fraunhofer Institute for Work Organisation. At regional level, consultant Birgit Weber from the University of Niederrhein from Mönchengladbach was responsible for cooperation with the company.

As the firm did not have any older workers at that time, the measures were considered as preventive as it would be too difficult for workers to accommodate to the new work structure at the age of 50.

- 2) personal experience of the director with his own age (knee surgery).
- 3) experience with the former employee of the earlier director who had worked until regular retirement age.
- 4) the interest of the director on receiving aid with organisational work in the office and during holidays.

The consultant aided the director in carrying out a workshop in the firm, during which the following measures were developed:

- making workers receptive for the use of lifting assistance and other auxiliary appliances.

As aid, a form was developed which is used till now and serves as a specimen when working for the same customer. One column of the table includes material needed for the work, and the other the needed auxiliary appliances. Their use (e.g. of hand trucks, laying equipment) is only a small measure which can however bring about large effects. The workers have also to be reminded not to overburden themselves

- software and PC trainings.

The firm uses the ERP system “WinDach”, the time registration form “OnTime” and occasionally other software for surveillance of solar panels. Workers have two pocket PCs which they take to construction sites and check customer and order-related data, when needed. The small office has two work places equipped with a stationary PC and a laptop.

- occasional assignment of office tasks to the 4 journeymen.

That serves both the function of releasing the director from some tasks connected to planning and surveillance of construction work. That measure is preventive, i.e. it is designed for preventing health problems in the long run by releasing workers from some work burdens. That way, a small firm like Plenkers can prepare itself for demographic change.

Some examples: The worker in the office can check in the ERP system the dates of the last repairs on behalf of the given customer, what material is needed and where it can be ordered. That way, his colleagues on the construction site are unburdened.

There is no fixed plan for job rotation, it follows the current need. During winter and in case of work-related health problems, workers work in the office more often.

The measures are designed for workers above 40 as those are to be retained in the company and as only at that age, the relevance of ‘demographic change’ becomes obvious. At the age of 50, in contrast, it may already be too late to start with that topic, as there are many persons of that age who are reluctant to use even fax and e-mail.

3. Age management practice

This section will describe personnel policy at Plenkers in fields which are not directly connected to the ‘good practice’ measure.

- recruitment:

Recruitment practice in the firm is geared towards young persons, who are either journeymen with completed vocational education or apprentices, as re-adjustment to new circumstances is difficult for older person. Only in one case, a 50-year-old was hired who had earlier worked at Plenkers and afterwards as a janitor for many years. Alas, his body has already adjusted to janitor's work. On behalf of long-term health, it is better if the body is accustomed to constant burdens and to occasional easier work (as at Plenkers) than if work burdens change continuously. In the roofing craft, the body has to get used to changes of temperature and other unfavourable climatic conditions.

- employee exit:

As workers are younger than the director, he does not have any experience with retirement. The company does not run a 'hire-and-fire' policy. Workers with long tenure who know 'what really matters' and who have good social skills shall be retained in the firm.

- health management/behavioural prevention:

There are no formalised appraisal interviews on the topic of health behaviour and the director is understanding towards workers who are not willing to do sports after work.

- form of the work relationship:

Journeymen have unlimited contracts but a small firm like Plenkers is not covered by the strict legal protection against dismissals.

- remuneration:

Collective agreements rule that salaries rise after 5 years of work in the branch. Further increases take place in case of job enrichment (promotion to the position of a foreman).

- work organisation/team work:

The craftsmen usually work in groups of two or three at the construction site.

- regulations in case of work incapacity:

In case of long-term illness, business volume decreases, as the long-term loss of one employee can not be compensated for in such a small firm.

- initial vocational education:

The company cares about educating apprentices in agreeable customer service, also in order to fight the stereotype that craftsmen are "*grobschlächtig*" and do not have proper command of language. The firm often receives applications from "*social risk groups*" (drug addicts, persons with unsuitable vocational education). Whenever a person with a good school leaving certificate is interested in the roofing craft, the occupational counsellors of the Employment Office persuade them into applying 'somewhere better'. In contrast to those opinions, the director knows that the roofing craft needs open and intelligent workers who are able to take on responsibility and to learn IT and who have good social skills. Increasingly, qualification at university level is required in this trade.

4. Development of the original measure and current practice

Criteria	Parameter value
Status of initiative	Continuation
Criteria	Parameter value
Target groups	Qualified workers
Type of measure	<ul style="list-style-type: none"> - Training - Work and working time organisation - Health promotion and ergonomics and job design - Changing attitudes
Social partners involved	No
Scope of measure	Age-specific

Measures which had been originally developed at the end of 1990s have remained the same.

The financial crisis has had an impact on the firm insofar as customers tend to plan on the short run and tend to cancel their former orders. Due to this, the firm has a stable order situation only for the next half year.

The success of demography-related measures at Plenkers can be depicted at different levels:

Result of IT trainings: Two persons of those who were at the firm during the Demotrans project (the time of the introduction of the original initiative) are still there. The training was effective with both of them, although only one person was IT literate at that time. However, the workers are not proactively striving to take over office work (*"The goal will have been reached then and only then when workers do it at their own initiative."*)

As a form of a 'educational measure' towards proactive behaviour, the director obliges his workers to do office work during his holidays (meaning calling customers, placing orders at suppliers, taking care of incoming e-mails). Going on holidays has been since recently the director's own health protection measure due to his own experience with fatal results of overwork in the family (father, sister).

The director thinks that taking one's own initiative is a special problem of craftsmen, and especially of roofers. As they usually work outside, they dislike office work. The workers have not yet realised that office work might be a measure enabling long-term employability.

Result of raising awareness of workers towards the use of auxiliary appliances: The use e.g. of laying equipment for bitumen strip makes it possible to work the whole day with a straight back. As of now, the director notices that workers are more willing to use such devices. The more physical disorders the workers have and the lower their physical fitness, the larger is their acceptance of auxiliary appliances. The director would however appreciate a more preventive and long-term oriented way of thinking.

The effect of initiatives has not been calculated. The release from burdens is too low to make itself felt in lower absenteeism rates. The workers have so far not commented on how they view the measures. It can, however, be seen that the workers have noticed the risen esteem and belief in their abilities which manifest themselves in the abandoned distinction between

tasks traditionally performed by the director (office work) and tasks traditionally performed by journeymen (construction work).

The success of measures manifests itself in the fact that workers can take on the duties of the director during his holidays and that they are able to organise their work at the construction site on their own, including orders and customer relationships.

There have been no negative effects of the measures.

Transfer to other firms:

The director believes that roofers are able to work up till the standard retirement age of 65 or 67 years, as long as they practise job rotation and use auxiliary devices. Awareness raising among workers should start well before the age of 50, as long as they are still open to new measures. Informal talks with directors of other firms have revealed that implementation of such measures is regarded as complicated in other firms, owing partly to the fact that the directors do not consider their workers as being fit for office work. Moreover, in medium-sized roofing firms (6-14 workers), there is more hierarchy and physically burdening work is assigned to only a few and always the same persons. Employees work at large construction sites without customer contact and organisational tasks are performed by master craftsmen. Only – by standards of the roofing craft in Germany, where half of firms employ between 1-5 workers – large firms with a repair shop, where older workers can be deployed, age-adequate work is possible.

In contrast to that, missing rigid hierarchies, opportunities for customer contact, absence of business secrets enabling employees to do computer work (which is easier to accomplish in a small firm due to lower business volume) – all those are factors of success of the measures at Plenkers. In contrast, negative is the fact that workers did not realise the importance of the measures upon inception as they were younger than 50 at that time.

The firm would appreciate the opportunity to use health promotion measures offered by health funds (e.g. back relief courses) which is difficult due to current legal restraints as workers belong to three different health funds. It would also be helpful in order to guarantee the success of measures if firm actors were not left alone after the kick-off of measures.

5. Concluding remarks from the researcher

Plenkers is the prime example of a model work organisation in a very small business which enables personnel development, improves learning aptitude of workers and preserves their health in the long run. The interview has revealed that in such a small firm, several factors coincide which are beneficial for the success of age-adequate measures – flat hierarchies, mixing of tasks and missing division between office and construction workers, opportunities for customer contact, short social distance between the director and his workers.

At Plenkers, further beneficial factors add – the openness of the director and his trust in workers (manifested in his willingness to reveal invoices and business volume to them) and his awareness of health risks due to his own experience. Also the age of the director makes a difference – if he was younger, probably he would be less aware of the ageing of his workforce.

While large roofing firms usually divide office work from construction work, work at Plenkers is intermingled and includes also conceptual tasks (consulting and planning/design) and most tasks are conducted without subcontractors. Also the early investment of the firm in new technologies has brought about variegated and unburdening tasks. The construction of solar panels also requires abilities to cope with modern technologies on part of workers and results in even further diversification of tasks.

The director assesses the measures as “*win-win situation*” – workers are unburdened and can cope with job requirements upon standard retirement age. The director is unburdened from part of construction planning which is especially important due to the low number of workers in case of temporary staff shortages in peak times or holidays – almost no one in the firm is irreplaceable.

The cases study offered interesting evidence on the topic life-course vs. age-group-oriented approach to age management. The director follows the life-course approach which however sets in only with regard to 40-year-old, incumbent workers who are to be retained and kept efficient in the firm until old age. An argument in favour of the life-course approach is the fact that 40-year-olds do not yet suffer from physical handicaps and are still open for changes and can adapt to new procedures. (The director assesses 50-year-olds as less flexible.) On the other side, the missing physical handicaps are a barrier to the success of those measures, as the 40-year-olds can not fully experience the importance of those measures (mixing of tasks, use of auxiliary devices) in physical terms and therefore resort to them only by explicit order of the director and not at their own initiative.

Contact details: Anton Plenkers
Anton Plenkers Solarteuer, Dachdecker- und Klempnermeister
Necklenbroicher Straße 62a
40667 Meerbusch

Phone: +49-(0)2132-2472
Fax: +49-(0)2132-3538
Anton.Plenkers@t-online.de
www.antonplenkers.de

CASE 7: Schalm GmbH & Co. KG (Mönchengladbach)

01.09.2010

Interviewees: Director, Person responsible for Personnel Administration and Accounting (joint interview)

Summary

The firm is run in second generation by the family. Regular, personal appraisal interviews play a crucial role for the division of tasks, career development and the assessment of health resources. The close contacts with each firm member and the knowledge about the determinants of his or her well-being bring about a motivated and cooperative staff.

First measures were implemented already in 1997 and have been preserved till now. Next to annual appraisal interviews, the focus today is on health management which takes into consideration also the personal lifestyle of workers. A central element here of is "regeneration", as pressure is increasing in craft companies and craftsmen have to react far more quickly to customer requests due to the spread of the internet. In future, health management shall be expanded in the direction of burn-out and depression prevention among persons above 40 years of age.

The director is sceptical about chances of transfer of measures to other firms. An indispensable prerequisite for this are committed manager who personally values health and fitness and who wants to design a health-conducive work environment in cooperation with the staff.

1. Organisational background

Criteria	Parameter value
Size (employees)	- Small (36 empl.)
Sector	- Construction
Works council?	- No
Business volume	- 3.8 million €

The firm was founded in 1979 and is currently managed by two directors. It operates in the field of HVAC, with focus on industrial customers. The firm is active in the whole process from planning to implementation. In times of expansion, the firm has outsourced three subsidiaries with 14 workers in total, which are responsible for planning, insulation technology and maintenance of industrial plants.

In the parent enterprise, the average age of workers is 35 years. Currently, four migrants are employed. 8% of workers (3 persons) are 16-19 years of age, 28% (10 persons) at age of 20-29, 17% (6 persons) at age of 30-39, 44.5 % (16 persons) at age of 40-49 and 1 person is 74 years old. 4 persons have a so-called „mini job“¹, three of them are women. In total, five of the workers are female and all have white-collar jobs.

¹ A job in which up to 400 € of non-taxable income can be earned.

The interviewees were of the opinion that there is a large gap in middle age groups which has been caused by exit of workers after completed apprenticeship, as most of them decide to complete their master craftsman education afterwards. Researchers are, however, far more astonished about the lack of workers aged 50-64 years. The reason for this is the abstainment from any new hirings till 1991, when the current directors took over the company. Only 1991-1995, large numbers of workers were recruited up to the age of the directors. All workers but one from the generation of founders have already retired.

Schalm GmbH is member of a guild and therefore covered by collective agreement. There is no works council in the firm.

Business volume has remained constantly, also during the financial crisis, around 3.8 million €.

2. Original measure

Criteria	Parameter value
Target groups	- All workers
Type of measure	- Training - Career development - Flexible working practices - Health protection and promotion and workplace design - Redeployment and retention - Other (annual appraisal interviews, teamwork, participation-oriented culture)
Social partners involved	- No
Scope of measure	- All ages

The measures have been developed for the parent enterprise but are transferred to subsidiaries as well. Further information in this text refers to the parent enterprise only.

The trigger for the introduction of measures in 1997 was the reflection of both directors how the company should look like in which they would like to spend the last 30 years of their career. Those thoughts led to the concept of „*motifaction*“: „*to go to work motivated and to go back home with inner satisfaction*“² The basis for this corporate culture has been laid in intensive talks with employees. The original measures can be described as follows:

- in the appraisal interviews, the workers' individual capacities and interests are unravelled. On this basis, workers are assigned to „*life-phase adequate tasks*“ (the director prefers this concept to the concept of „*age(ing)-adequate tasks*“). Those tasks are subject to a horizontal change in the course of the career, but not necessarily to a vertical promotion.

² The visitations report of the AgeCert evaluators names also the following reason for the introduction of measures: „*In the year 1997, the firm had a high level of sickness absence of 13 days on average. The unfavourable working atmosphere and low satisfaction with work had led to large fluctuation of workers to industrial companies with higher wages.*“

- as the firm provides a large range of services, constant further training is necessary and also beneficial for workers, as up-to-date know-how can partly replace physically strainful tasks and that way unburden workers.

The “Agreement of Objectives” stipulates 6 internal and 2 external training courses per year. They serve the preservation of inner and outer flexibility. However, it is very difficult to convince workers to participate in external training. The firm reimburses workers also for training not related to the field of work, like foreign languages, rhetoric or sports courses.

- there is a wide range of measures in the field of health.

Events on the „5 pillars of health“ are organised. They deal with nutrition, sports/agility and inner balance. In 2001, an analysis of work burdens was conducted together with the Guilds’ Health Fund (IKK). A physiotherapist and a sports instructor have developed on that basis a weekly programme on circulation, regeneration, relaxation and stretching. An analysis conducted one and a half year later has revealed a decided improvement of physical burden symptoms of workers. As a reaction, a trainer was assigned the task to conduct annually a three-day seminar at site or outdoors. The outdoor trainings are designed to get to know body reactions e.g. to physical strain and hunger in order to find a better balance for oneself. An objective of all those measures is to increase physical and mental agility in order to raise the fun of dealing with new challenges at work.

Once a month, a worker has the chance to organise a sports event at which he or she presents a sports discipline („*infectious health*“). Analysis of sickness data brought to the fore that reasons usually can be found in leisure time. E.g., there were many motorcycle accidents among young workers. The firm reacted to this with a driving course.

- office design has aimed at creating „*living spaces*“, which are colourful and reflect the needs of workers.
- flextime accounts – they have to be announced a day before and are compensated for by overtime.
- once per year – setting of annual business objectives together with workers.
- age-mixed teams – new teams are permanently and automatically created whenever workers go to a new construction site.

The respective philosophy of the directors of Schalm GmbH is: „*The firm is a living organism. Just imagine how it would look like with many invalid cells.*“

3. Age management practice

In the following, the personnel management practice of the firm in realms which are not directly connected to age management will be presented.

Recruitment policy: Workers usually enter the firm as apprentices, as external workers do not fit into the company due to corporate culture which requires enthusiasm and initiative.

The firm constantly suffers from a lack of apprentices which can not be compensated for by employing qualified workers, as in recent years, a new job profile (mechatronic engineer, HVAC systems mechanic) and a new market (air conditioning in office and living spaces and regenerative energy sources) has developed. It can also not be compensated for by

specialising systems mechanics who are already in the firm, as they have already reached a good position and are not flexible enough to accept a change of jobs. The flexibility decreases already at the age of 30. Also the employment office can not provide the firm with adequate long-term unemployed with technical and craft skills.

Remuneration: The collective agreement rules out a differentiation by age, the wage structure is quite level. Nevertheless, the firm would favour such a solution, as, according to the director, „*the interest in being a high potential*“ and intrinsic motivation to work decreases in midlife (around 42-49 years of age). This is connected to the fact that those workers have already reached the endeavoured position at work and do not have any more family responsibilities which would require working overtime. Therefore, decision-makers at company level would appreciate the opportunity to disengage workers, in accordance with them, from part of tasks and responsibility and pay them lower wages, accordingly, also in order to make a „work-life balance“ for the workers possible. The director has observed that the attitude toward life and work inevitably changes in the course of life.

Continued employment of older workers: Most workers retire early at the age of 63. The 74-year-old workers re-entered the firm after one year of retirement and now works two days a week and is commissioned with easier tasks.

4. Development of the original measure and current practice

Criteria	Parameter value
Status of initiative	- Continuation
Target groups	- all workers - workers 40+
Type of measure	- Training - Career development - Flexible working practices - Health protection and promotion and workplace design - Redeployment and retention - Other (annual appraisal interviews, teamwork, participation-oriented culture)
Social partners involved	- No
Scope of measure	- All ages - Age-specific

The initiative develops in the direction of an expansion of age-adequate measures, with one exception. Earlier, sports courses, resp. subsidies to a fitness centre card were offered. After the staff had achieved a better state of physical fitness, the interest in those measures sank.

Annual appraisal interviewees have been continued since 1997. If they uncover personal problems of workers, help is offered. E.g., a female worker was given two weeks extra holidays in order to recover after the heavy illness of a family member. Another workers who suffered from burn-out had to choose between dismissal and taking a cure.

Despite the measures being directed at all workers, health management for workers aged 40 years and older shall be intensified in future, especially with relation to burn-out and depression. An internal (part-time) health manager will be in charge of that task.

An essential honour to the firm has been recently being awarded with the AgeCert certificate³ in 2009. The total result of Schalm GmbH's self-assessment was 71%, while the visitations team has assessed each dimension of age management slightly better. The following facts were highlighted:

- workplace design (score: 68%): Both directors are health managers by qualification, issues of workplace design are settled during annual target planning meetings.
- career development (score: 79%): The visitation team mentioned as a restriction, that older persons can be recruited only for administrative positions.
- health behaviour (score: 67%): the integration management at company level made it possible to place an incapacitated worker in another company, sports and physical exercise are a topic raised in appraisal interviews, there is a company physician, social control in the firm unravels signs of overstraining at an early stage and solves it at low threshold.
- further training (score: 82%): Is part of annual target planning, of the assessment of workers („SchalmMAX“, see further below) and in appraisal interviews, there exists a process instruction on further training, a qualification needs assessment and evaluation of further training is conducted.
- remuneration models (score: 56%): The programme for assessment of workers – „SchalmMAX“ – is at inception phase. It will form the basis for appraisal interviews and assess the worker along various dimensions, e.g. punctuality, physical/mental/emotional fitness, realised ideas, smoking, ability to deal with criticism.

Besides of being awarded AgeCert, the firm has had other success stories recently:

- The intensive talks with workers have allowed to unravel their individual capabilities and interests and to allocate tasks accordingly. Non-motivated „troublemakers“, who did not fit into the company, have decided on their own to leave it.
- After the first analysis of work burdens in 2001, measures had been introduced and continued for 1.5 years. At times of the second survey in 2002, a decided improvement with regard to physical strains of workers was found out, which can be traced back to those measures. The improvement shows with regard to personal well-being of workers, increased physical fitness and better health behaviour and dietary habits.
- Despite the fact that the firm has large expenses for the outdoor trainings, their effect can not be directly measures. However, a better team spirit among workers who participated in the trainings can be felt. Also, their identification with the firm has risen.
- Schalm GmbH always ranks first in rankings of 5,000 firms conducted by the local Sparkasse, e.g. with regard to productivity.

³ AgeCert is a certificate awarded to firms with a model age-adequate personnel development. It is awarded on the basis of self-assessment and site visits conducted by external evaluators. It was developed at initiative of the Cologne-based foundation Marie-Luise und Ernst Becker Stiftung.

- Quality of services has improved, which can be read off from higher customer satisfaction. According to the management, this can be traced back to motivated workers, as workers who have mentally resigned make more mistakes.
- The firm has received several prizes, e.g. for the most motivated team, for the best personnel management, or the Best-Practice Award of the Initiative „Gesünder Arbeiten NRW“ („Working Healthier Northrhine-Westfalia“).

Nevertheless, also some failures in connection with age-adequate measures have happened in the firm. Thus, there were plans to introduce lifetime work accounts which would allow a flexible (and, due to a direct insurance fund, transferable to other firms) use. Workers could have used them for taking free-time for regeneration, for working part-time, for retiring earlier or for making a large investment, e.g. buying a flat. Even in case of savings from the 50th to the 63rd year, the worker could have saved enough to take a regeneration break of three months. However, due to financial obligations, staff was not willing to postpone the receipt of a part of their wages. This will aggravate the approaching problem of workers having to continue work until the age of 67 (due to the rising of retirement age in Germany). According to the director, the chances of reaching retirement age in one's current job depend on personal lifestyle, especially on the ability to regenerate. Customer pressure has increased due to the internet, the life of workers is determined by stress and hectic pace .

No impact of external, political or economic, framework on the opportunities of introducing and using the described measures could be made out. At worst, the financial crisis has delayed some customer orders by several months, but business volume has remained the same.

Schalm GmbH sees opportunities for transfer in other firms only if decision-makers are ready to get involved in those issues and to personally agitate in favour of them. Under the condition that they are open for those issues, those measures can be implemented also in large firms due to the personal contact between team managers and subordinates. The director of Schalm GmbH is ready to participate in information meetings on those topics.

5. Concluding remarks from the researcher

Schalm GmbH is an example of a proprietor-run firm with low social distance between directors/superiors and workers and high social control with regard to physical, mental and emotional fitness. The control makes itself felt in intensive appraisal interviews and close contacts between colleagues. Fitness is an expression of individual well-being, which is of high importance to the management, and secures motivated and efficient workers for the firm.

Although there is no works council in the firm, age-adequate (or rather „life-phase adequate“, which is an expression favoured by the director) measures were introduced in a participatory process and reflect the esteem shown for the workers.

In fact, the management denies it that cost-benefit calculations laid the basis for the introduction of measures. Also, no measurable economic benefit was acknowledged. However, the director often spoke about the firm as an organism which is healthier with many healthy cells. This can be also transferred to „economic health“. One can also presume that committed, even-tempered and physically able workers deliver a better performance and

increase customer retention. Accordingly, the interviewees admitted that the quality of services has increased and that Schalm GmbH ranks first in regional productivity rankings.

Measures can be transferred to small companies where superiors have close contacts with employees and thus know about their career plans and in their load situation, companies in which job satisfaction is a business target.

Contact details:

Norbert Schalm, Managing Director

Schalm GmbH & Co. KG

Borsigstraße 17

41066 Mönchengladbach

Phone: +49-(0)2161-694640

schalm@schalm.de

www.schalm.de

CASE 8: „Germany 08“ - Manufacturing (anonymous)

22.09.2010

Interview with the head of human resource management

Summary

The medium-sized company „Germany 08“ which was affected by considerable reductions of employee numbers after German reunification orientates its human resource planning and development in the longer run. This is manifested in regular adaptations of labour systems to make them less overstraining and in considering each age group in recruitment and appraisal interviews in order to retain long-term employees and their extensive know-how. Especially for older employees some measures will be implemented soon which shall enable an employment up to the age of 67, e.g. transfers to less complex activities and exclusion from the three-shift-system. During the commercial crisis the company could retain its permanent staff due to short-time work. Qualification measures were conducted during the period of short-time work.

1. Organisational background

Criteria	Parameter value
Size (employees)	- Large (326 empl.)
Sector	- Transportation Equipment & Mechanical Engineering
Works council	- Yes
Business volume	- 34 million €

The company was founded in 1942. Since the market opening after German reunification, 50 % of the turnover has been realised in the automotive sector and 50 % in machinery and plant engineering (cranes, shipyards, ships, rolling mills, diesel locomotives).

Currently, 326 employees are working for the company. 27 % are aged up to 30 years (88 persons), 12 % are aged between 31-40 years (39 persons), 24.5 % are aged between 41-50 years (80 persons), 32 % are aged between 51-60 years and 4.5 % are at the age of 61 years and beyond (15 persons). The less well-staffed age group between 31-40 years is associated with the downsizing of employee numbers from 1,600 to 200 after German reunification. In line with social selection criteria, younger employees were dismissed.

9 % of the employees (29 persons) are women. Minimum qualification of employees is a vocational education (69 %). Moreover, the company currently employs 8 % apprentices, 4 % university graduates, 13 % university of applied sciences graduates, 5 % technicians / masters and 1 % semi-skilled staff. 15-20 persons execute mere business activities. Some of the employees in industrial sector are deployed at workplaces which mix business and industrial-technical activities. The company's employees work in a three-shift-system. There is no assembly-line work and no working overhead, working activities are mainly executed at

industrial workplaces (machining, lathes, milling machines, drilling machines, grinding machines and mixed workplaces). Auxiliary devices are used, sub-processes are automated. Holding parts in the assembly and removing parts from the machine are the only physically heavy activities which have to be performed without auxiliary devices; however, the proportion of this work is low. A part of the workplaces is very complex and includes the four processes programming, setting-up, operating and quality management.

There are only few persons with migration status. 10 Persons work part-time. Labour turnover rate is almost 0 %.

In 2009, the turnover was 34 million €, this year it will be over 40 millions. A considerable slump happened due to the financial crisis – in 2008 the turnover reached over 50 millions €. Through short-time work, layoffs could be averted.

2. Original measure

Criteria	Parameter value
Target groups	<ul style="list-style-type: none"> - All workers - Shift workers
Type of measure	<ul style="list-style-type: none"> - Job recruitment - Training - Career development - Redeployment and retention - Employee exit - Other (annual appraisal interviews, protective measures for older workers, e.g. exclusion from 3-shift work)
Social partners involved	<ul style="list-style-type: none"> - Yes
Scope of measure	<ul style="list-style-type: none"> 3. All ages 4. Older workers

The motivation for introducing the measures by the end of the 1990s was the relatively high share of older employees (about today's level). The measures were implemented in line with a VDMA⁴-project which was conducted with the ISO-Institute Saarbrücken. In this context the company considered how to accomplish a "reasonable transition to retirement" by using state funding as well as how to realise ways of job rotation for persons who are not able to perform their usual job until retirement.

It was planned to offer employees who worked in production and disposition and who were exposed to manifold stress factors (amongst others to the necessity of being flexible enough to adapt to continuously changing situations) a job in the warehouse which was equally high-graded (no adapted workplace, no downgrading, merely less complex work assignments). However, the possibility of redeployment wasn't accepted. Moreover, in case of long-termed shift work there was the possibility to get excluded from the three-shift-system, but this was used by only one person within the last 10 years. Also partial retirement was only used by 70 % of the claimants, which the human resource manager associates with increasing

⁴ Verband Deutscher Maschinen- und Anlagenbau – German Engineering Federation.

deductions for younger birth cohorts. There were no differences noticed in the use of measures by gender.

The measures were developed by both management and works council in line with the VDMA-Project. As the company does not belong to an employer's association it is not affected by collective agreements which involve aspects around demographic change.

The measures which were originally listed on the "awise"-database also included personal appraisal interviews about development potential (personal and professional) during which older employees often expressed the wish for relief. This was answered with the readjustment of workplaces and task areas and with the qualification of skilled workers in order to enable advancements in less physically-loaded positions.

3. Age management practice

Following some personnel policy aspects of „Germany 08“ are described which are not directly connected to the analysed measures.

Job recruitment: In the end, mainly persons aged between 40-45 years were hired. There are also (apart from momentarily practised short-time work) employment chances for older applicants. 2006-2008, several recruitments were made. 10 % of the 30-40 persons recruited in 2008 were aged over 50 years. The human resource manager notices a similar philosophy in other medium-sized companies.

Occupational health management: Preventive examinations which are prescribed by the trade union are conducted as well as specific measures, e.g. influenza virus vaccination, eye examinations, generous sponsoring of sports clubs and –events, company-football match. For 2010 a health care day for apprentices is planned (nutrition, sports). The formerly offered back training wasn't accepted. During the period of short-time work, trainings for correct lifting and carrying were performed by physiotherapists at the workplaces. However, the encouragements weren't put into praxis by the employees as turning away from accustomed workflows was difficult for them. There are no differences by age in this context.

Qualification: In 2009, extensive qualification measures were conducted during the period of short-time work: 140 obligatory individual trainings of 40-120 hours per employee on "hard" topics (e.g. statistical process calculation, languages) and on "soft" topics (health care, nutrition, handling of addictive drugs). There were no age differences in using the trainings.

Organisation of Work: Since 1992, self-regulating group work has been existing within the framework of a "*fractal factory structure*". In line with this teamwork employees are responsible for the allocation of tasks and cooperatively develop the group wage.

Remuneration: Remuneration is age-independent as this would be incompatible with the AGG (Allgemeines Gleichbehandlungsgesetz = German General Equal Treatment Act). Remuneration depends on professional qualification, job requirements and quality of job performance. When certain long job tenure is reached, a gift item is awarded.

Transfer of knowledge: This is realised on basis of competence models (balance between professional qualification, demands of the job and the ability of the employee to cope with the tasks). From a certain year of vocational training the employee is introduced to the target workplace under guidance of skilled workers. As the introductory training can last up to 8 years at some workplaces, prospective employees are involved at an early stage in form of

internships and diploma theses. A high degree of practical knowledge is necessary for the workplaces.

Career development: There is a flat hierarchy – managing director, fractal manager, persons in charge of costs centres, employees. Development takes place mainly horizontal, by specialisation.

Flexitime: There is almost no part-time work. There are working-time accounts but no compensation time accounts for cost reasons and because of the necessity to cover risks.

Work-care balance: This plays a part, the company grants a time-out for 1-2 years if needed.

Retention of older employees: When partial retirement was still offered, employees dropped out via block model mainly (70 %) at the age of 63 years. Before partial retirement had been introduced other statutory exit models were used, e.g. early retirement. In the past, occasionally persons have worked over the retirement age in the company. Currently, this is not the case and the human resource manager rules this out for the future, in order to maintain peace at the workplace and to open chances to younger employees.

4. Development of the original measure and current practice

Criteria	Parameter value
Status of initiative	5) Continuation
Criteria	Parameter value
Target groups	- All workers
Type of measure	- Job recruitment - Training - Career development - Health protection and promotion and workplace design - Retention - Other (annual appraisal interviews)
Social partners involved	- Yes
Scope of measure	6) All ages

Appraisal interviews are continued. A special emphasis is given on interviews with persons who are in transition from work to retirement. Thereby, there is talk about future perspectives and it is attempted to retain employees as engineering expertise is valuable (the entire vocational qualification and introductory training is very time-consuming as it takes 8 years). In this way, the company prevents manpower shortage. In the company, human resource development has a planning horizon of 7-8 years.

Since 2007 up to this year (2010) the company has been involved in a preventive project together with the institute GFAH from Dortmund (under project management of researcher Annegret Köchling) and the ISO Institute from Saarbrücken. The project is named “Legesa” and focuses on psychological burdens. The background was the realisation that some of the new hired employees have adaptation problems at some particularly complex workplaces.

The assumption that the complexity of workplaces has overstraining effects could not be proven. It was rather noticed that some employees have an insufficient vocational training or lack of qualifications. In other areas, the problems were led back to the deficient labour system; the result was a reorganisation of work.

The human resource manager emphasizes the statement that changes in the labour system which had been initiated by the preventive project were not at all related to age or ageing. Working conditions shall be more bearable and guarantee enjoyment of work so that the job can be easily performed up to the age of 67 years. Younger employees are confronted even more urgently with this task than older employees as the former will have to work longer under these working conditions.

The labour system is continuously adapted. Last time this was made in 1994. Every second year, job satisfaction and other factors of the working environment are enquired.

Use of measures by employees:

By the end of the 90ies introduced possibilities of redeployment to easier workplaces and exclusion from the three-shift-system weren't adopted. The human resource manager explains this with a declining willingness of older employees regarding modification as they don't wish changed tasks in the last 2-4 years of their employment: *"For them redeployment is a bigger problem than the strain."*

It is also regarded as an internal failure that partial retirement was used by only 70 % of the claimants.

It is planned to offer redeployments and reduction in shift-work again to long-tenured employees, assuming that work will get increasingly difficult because of the raise of retirement age up to 67 years (preventive approach). The human resource manager assumed that there might come up problems with night shifts and with complex tasks which have fewer and fewer structure, which are strongly intermixed and require the adaptation to new task areas (e.g. new software). Up till now, there have been no cases in the company that someone was not able to cope with work for health reasons.

For now, the human resource manager is developing with the trainee a succeeding model for partial retirement the details of which he could not yet specify. The regulation shall be applicable from 2011 on and is supported by the company alone. A solution for bridging the last time before retirement at the age of 67 is developed in lack of a company pension scheme which a medium-sized company couldn't realise.

5. Concluding remarks from the researcher

The company has a balanced age structure, also thanks to the philosophy that only qualification and not age counts in hiring. In this way, the company can protect itself from manpower shortage. The measures – as well specific as also regardless of age – are actively lived in daily work, during the interview they were presented with understatement and modesty.

One motivation for introducing the measures, apart from the participation in publicly funded projects, seemed to be the competitive situation of the medium-sized company with regard to

skilled personnel. The necessity to retain skilled personnel and to train new employees arises from the long initial training period as the company has workplaces which are complex and composed of several fields of activity. Typical of medium-sized companies seems to be the flexible handling of time-outs regarding care obligations which had been practised in the company before the planned legal regulation under minister Schröder, as the human resource manager pointed out.

Currently, in personnel policy measures dominate which are age-independent and preventive orientated as age-specific measures which had been offered in the past weren't adopted by employees. Against the background of the raised retirement age, the company again wants to offer age-specific measures as a particular problem emanates from the three-shift-model. There is no pressure towards employees to use the measures. It is rather counted on the employees realising the pressure through the raise of retirement age themselves and acting correspondingly

Worth mentioning is the "competence model" practised in the company which is a kind of balance between training needs and job requirements.

A risk to the long-term success of the measures might go along with the inflexibility of employees (no interest in health-promoting job rotation, deficient realisation of recommendations regarding the correct carrying and lifting at workplaces).

CASE 9: “Germany 09“ (anonymous)

8.11.2010

Joint interview with project manager and employee of human resource department

Summary

Already in 2004 measures were introduced at „Germany 09“, first in line with a pilot project in one of the plants (2007). Since 2009 there has been a roll-out to further company sectors. Upcoming plans include an extension to the office sector. Thus, the case study is absolutely to be classified as long-term case, even if it hasn't been documented in any good practice database so far.

The measures are to be regarded as integrated in their orientation and embrace the areas of health management, qualification, workplace environment, qualification and communication/change management. The focus is set on the ergonomic and time-wise workplace design in production as well as on the sensitisation for health-promoting behaviour.

The measures are introduced with close participation of works council and staff, opposition is overcome by convincing. Success is to be seen in an increased productivity and ergonomic improvements.

1. Organisational background

Criteria	Parameter value
Size (employees)	- Large (70,000 empl. in Germany)
Sector	- Transportation Equipment
Works council	- Yes
Business volume	no information

The spatial expansion of the company started in the 1970s. Currently, „Germany 09“ is represented in 150 countries with almost 100,000 employees. The company belongs to the metal- and electrical industry branch.

The most severe organisational changes in the last years were the increasing competitive pressure and last year's decrease in production. Reaction on these challenges was to figure out how employees can remain both economically productive and healthy.

The labour turnover rate fluctuated between 3 % (2005-2007) and 6 % (2008) in the last years. The share of women is 13 %, management personnel 8 %, production sector 7-8 %, office sector 15 %. Currently, there are 5,740 employees with a citizenship other than German (8.2 %). There is no documentation of qualifications but there is a large share of skilled workers and almost no unskilled workers. 40 % of employees in Germany are industrial (“direct sectors”), 60 % work in offices (“indirect sectors”).

The separation between direct and indirect sectors is as follows:

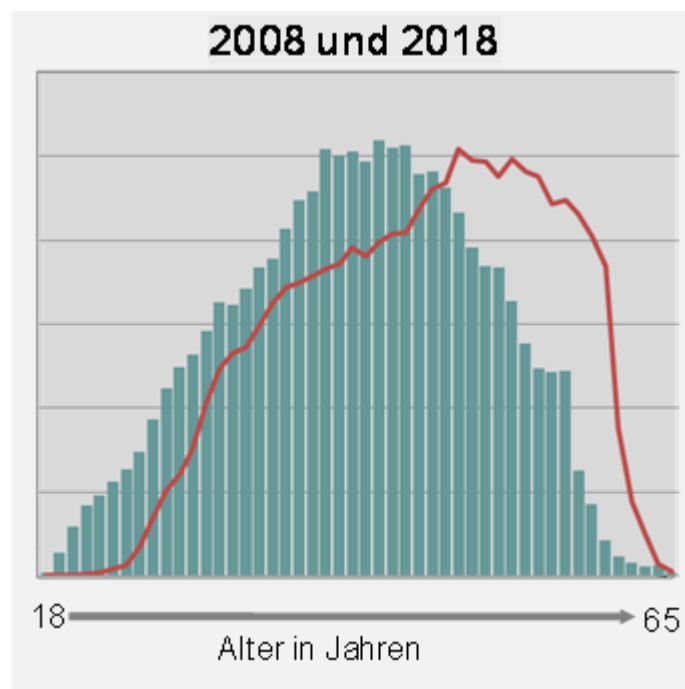
- Direct sectors: heavy physical load, highly repetitive activities (employees at production lines and in workshops; most industrial workers do assembly-line work, the operating speed is “heteronomous”).

- Indirect sectors: employees in offices, distributors, sales representatives.

The share of part-time staff is 5 %. “Core staff” embraces all employees (also temporary) but excludes subcontracted interim workers and apprentices. The age structure can be characterised as middle-age-centred (compact). Only at one location the structure is more balanced as there is also a greater number of older employees represented. Germany-wide, the average age was 42.7 years in June, 2010. Age-composition is as follows:

- 20 to < 30 years: 13 % in direct sectors, 8 % in indirect sectors
- 30 to < 50 years: 57 % in direct sectors, 65 % in indirect sectors
- 50 years and older: 20 % in direct sectors, 26 % in indirect sectors. There are almost no employees older than 60 years.

The chart below shows the age structure in 2008 and the simulation of a development to 2018 (the average age would increase from 41.4 to 46.4 years within this time frame; here a subsequent employment of apprentices is not included):



The rate of unionisation is relatively high amongst the industrial employees. The cooperation with employee representatives regarding age management measures is strong, “*very fruitful*” and “*works very well*”. But the most active role in initiating and implementing of measures is played by the management. The more widely the measures are spread, the less the management has to show initiative. Employees are involved in the project in two ways: in the development of alteration suggestions and information about the background of the changes. It takes 3-5 months to implant the measures in a group of 30-40 employees.

There are no works council agreements pertaining to age management issues (except for partial retirement).

2. Original measure

Criteria	Parameter value
Target groups	- Blue-collar workers
Type of measure	- Awareness-raising a. changing attitudes - Work and working time organisation - Health promotion and ergonomics and job design
Social partners involved	- Yes
Scope of measure	- Age-specific - Overarching

In 2004 a project for maintaining the performance of employees was initiated against the background of demographic changes. The basic idea was that many potentials worth to retain come along with older age – quality awareness and know-how. Moreover, there is the danger that neglecting measures could result in an increase of employees with inferior performance as well as personnel costs and organisational effort in the future. The programme is concentrated on the aspects leadership, qualification, organisation of working time and on health management and thus is to be seen as an integrated approach.

The initial motivation to implement measures arose from watching societal trends and from deliberations regarding success-critical challenges, such as demography. The measures in line with the project are part of a sustainability strategy which embraces apart from economical also ecological and social aspects. Seen formally, the programme is embedded in personnel sector (in the line), including gateways to other resorts. The departments are entrusted with the implementation. Formerly, the project had a project-structure, today it is a „programme“, which underlines sustainability.

Since 2007, the programme has been intensified. The age structure of the year 2017 was simulated for one year at one production line in one of the plants in order to be able to assess effects on productivity and necessary adaptations of labour systems. Measures in the fields of ergonomics, leadership as well as workshop regarding health and prevention were introduced. Amongst others, the project was evaluated using the work-ability index. Indicators were productivity (measured as piece number/output of the production line), quality (measured as “ppm” – faults per million parts) and attendance rate. Concerning all these factors there were improvements after one year. From the pilot investigation the insight arose *“that also with an ageing staff competitiveness can be maintained if frame conditions are adapted correspondingly”*.

Within the framework of the initiative, the following changes have been executed:

- ergonomic design of workplaces (e.g. damped timber flooring, damped shoes);
- working time organisation
- development of a patent by apprentices for circlip pliers which up to that had to be compressed manually with a force of 30 kilogram (the force needed was halved; an alternative technical solution could not be developed);

- because of short cycle times (1 minute) the loads are very unilateral – through physiotherapists employees were taught corrective- und stretching exercises which in future shall be done during downtimes or breaks;
- awareness-raising of employees: lectures, test with analysis „biological age“, workshops on exercise, nutrition, mental fitness, stress. Employees were given encouragement for everyday working life (job rotation in order to maintain mental fitness) and spare time (exercises instead of TV consumption);
- job rotation between workplaces with low and high burdens based on an ergonomic assessment system which registers loads at single body regions.

3. Age management practice

Following various dimensions of age management are explained which are not directly related to the depicted initiatives.

Recruitment: Currently, it is paid attention to hire employees from all age groups as the simulation of the age structure up to 2017 showed that there will be a great gap at the lower and upper end of the age composition. At a certain location older employees were hired.⁵ This turned out to be difficult as older persons rarely applied for the jobs. Therefore, the site cooperated with employment agencies and press. Because of this recruitment practice, the site has a more balanced age structure than the other sites.

Working time: There are offered various part-time models, both at blue- and white-collar workplaces:

- Fixed – e.g. reduction of daily working time by the hour;
- Variable – e.g. employment at 2-4 day per week;
- Seasonal – e.g. flexible seasonal change between full- and part-time;
- Fulltime Select – additional days off (see chapter 4);
- Sabbatical.

Work is done in a 2- to 3-shift-system, also in a full- shift system (in mechanical production). In cooperation with a scholar, an Excel-based shift evaluation model was developed. Based on this model work scientific insights regarding shift duration, the succession of shifts and the distribution of spare time phases were implemented in a pilot sector – with positive results for the age-oriented organisation. Formerly, shifts were highly blocked and separated by eight days leisure which pleased employees but is seen to be health-critical in science. The new model was developed in cooperation with the works council and offered to employees as possible selection from different models. Now, the assessment instrument is always used as evaluation basis when new shift models are introduced.

Further training: qualification is done when new products are introduces as well as on topics of individual health promotion. A certain further training budget is available for every employee. Further trainings are chosen together with the superior from a catalogue. Further training measures which aim at personal development are mainly used by office employees.

⁵ Information from „Spiegel online“, dated June, 6, 2005. As a reason for recruitment practice it was named that the company needed age-related fluctuation in order to remain economically flexible whereas newly hired younger employees would stay in the company normally for 25 years.

As a result from the programme the “project camp” is integrated in regular further training as a form of job-integrated learning (see chapter 4).

Occupational health management: integrated in human resource management and responsible for the offers is the health management department which embraces following competence centres: occupational medicine, labour organisation, exercise, nutrition, vaccinations and travel medicine, mental health, dermatology and allergology, disability management, emergency medicine and –management as well as IT and statistics. In 2010 various activities took place in line with health promotion with up to 6,000 attendants, amongst others regarding cancer check-up, fitness and mental health (information from documents of “Germany 09”).

Against the general trend male employees at “Germany 09” participate in measures of health promotion in accordance to their higher staff share. 90 % of employees are BKK-insured (BKK = company health insurance fund) which facilitates the arrangement of measures. In addition to the measures which were implemented in line with the programme (chapter 2 and 3) a day of action “psycho-mental health” (stress- and burnout-prevention, work-life balance) is offered and food in the canteen is marked according to ingredients with “traffic light colours”.

4. Development of the original measure and current practice

Criteria	Parameter value
Status of initiative	- Continuation
Target groups	- Blue-collar workers
Type of measure	- Job recruitment - Awareness-raising a. changing attitudes - Training - Flexible working practices - Health protection and promotion and workplace design - Redeployment - Employment exit - Comprehensive approaches - Other (company pension scheme)
Social partners involved	- Yes
Scope of measure	- All ages

Following the pilot field in one of the plants (chapter 2) in every site „seeds“ were set between 2009 to mid 2010 in which the new measures are tested in the field of occupational health management, but without simulating the age structure of 2017. 400 blue-collar workers participated. Based on the pilot studies standards for the design of labour systems were developed which are now disseminated comprehensively. Interconnected with this is “change management” as the implementation of the new measures requires employees’ willingness to change. As not every employee can master every working place (keyword “job rotation”, see chapter 2) individual solutions had to be found. First, this happened against resistance; employees had to get accustomed gradually to the new work tasks. But after the pilot phase about 80 % expressed their satisfaction with the measures (*“the day passes faster”, “health problems have decreased”*). Employees with changed performance normally

are furthermore involved in assembly-line workplaces, unless the cycle-dependency means significant mental strain to them.

Another aim is the roll-out to all direct and indirect sectors. Thereby all five fields of action (health management, change management, qualification, employment exit models, working environment) are seen as equally important. At indirect workplaces (in offices) the dealing with load peaks (due to the increasing share of project work) and prolonged sitting are key challenges. Other important topics are collegial interaction and management culture. Managers shall be sensitised for different needs of younger and older employees. Currently, a load analysis is prepared in the indirect sector.

The measures are not tailored to older persons but *“life course-oriented”*. All employees shall be made *“fit for future”*. Also during the crisis the programme was carried on.

The programme has an integrated approach and includes measures in following five fields:

- Health management: Forum Health (2006-2008; generating an individual health profile; health counselling of all in all 28,000 employees in Germany), target-group-specific follow-up measures, network rehab, integration teams, BKK health report, BKK bonus programme (12,270 attendants in 2008):
- Qualification: age management seminars, health trainings, job-integrated forms of learning, improvement of the individual learning competence;
- Working environment: individual working time models, age-oriented shift-plan arrangements, load-optimized redeployment, age-oriented design of labour systems;
- Communication/ change management: external communication, prevention portal *“My provision for the future”*, branding of *“My provision for the future”*;
- Retirement models: partial retirement (ATZ), ATZ follow-up model, pension plan.

As most important determinants regarding employability the company identified following factors with help of the work-ability-index: musculoskeletal disorders, communication/ dialogue with the foreman and satisfaction with own decision-making power/ room for manoeuvre. Because of the fact that performance parameter disseminate widely the company wants to offer individual instead of general solutions. An example is a working time model in which line employees who have a higher need to regenerate can take 20 additional days off. Indeed, there is a loss of earnings for those days but pension scheme contributions are paid continuously. Older employees often make use of this offer. Part-time in general is used more often by women (to 90 %) but in turn the working time model mentioned above is used more often by men (over 80 %). Currently, 1,760 employees make use of this. Production- and office employees use this option in equal shares. It is also used by management personnel.

The measures aim at the retention of all employees' performance. But *“Germany 09”* also sees the necessity of an exit model. A follow-up model is approved together with the works council. In general, the new partial retirement is offered as block model and with a longer duration (depending on age-group) than before (6-7 instead of 5 years). Formerly, up to 80 % of the claimants used partial retirement. Another measure is addressed to management personnel in form of *“age management seminars”* which were piloted in cooperation with a scientist. Their function is to sensitise for challenges which arise with an ageing workforce and a corresponding role of management personnel. Further trainings are advanced at this

time: management personnel are taught how to pass on measures from the programme to their employees.

In line with the qualification element the so-called “Project camp” was introduced in IT sector, initially as pilot project. This is a combination of self-directed learning in age-mixed teams and learning with trainers whereby topics from everyday working life are worked on (information from documents of “Germany 09”).

In line with age-oriented design of workplaces emphasis is put on measures which minimise stooping, bending and stretching and reduce lifting and carrying of stocks (e.g. through height-adjustable pusher plates, pivot mount or the work at smaller production modules, so that a decoupling from clock-dependent work can take place; information from documents of “Germany 09”).

The **benefit** of measures in line with the programme was obvious in ergonomic improvements as well as increased productivity of employees. But increasing productivity was only a by-product of the initiative and not the initial motive for implementation. The financial effort was kept at tolerable level and it could be proved that several small measures achieve a great effect. However, it was difficult that single measures in line with the running process of change met with resistance – e.g. the implementation of the new shift model needed more convincing because there was a collision during introductory phase with the leisure planning of employees.

A **transfer** to companies of manufacturing industry is possible. As framework condition the participation of employees has to be kept. Economic conditions are not relevant in this context as investments weren't very high at “Germany 09”. Companies have to show willingness to keep employees fit for work in view of demographic changes. This limits transferability to emerging countries in which demographic changes are as progressed as in Germany. The measures at “Germany 09” also adapt legal regulations as a retirement at the age of 67 years wouldn't be possible with reduced employability of personnel.

5. Concluding remarks from the researcher

Age-oriented resp. “*life course-oriented*” measures at “Germany 09” are an example for an integrated, life course-related approach. Initially, the focus was set on ergonomics, shift plan arrangement and the training of health-supporting behaviour. Currently, the focus is being broadened to include the topics management (age-management seminars) and psycho-mental loads at office workplaces and what has been achieved until now is being rolled-out stepwise to all assembly workplaces and later also to office workplaces.

In order to meet heterogeneous needs of employees which especially in older age increasingly differentiate the company offers individual solutions regarding the organisation of working time (choice between various part-time models which are also possible in production sector and additional days off) and regarding qualification in office sector (further trainings are chosen from a catalogue together with the superior).

Supporting factors for the success of the measures on the one hand seem to be the participation of employees as well as the favourable cost-benefit ratio. This could also support the transfer to other companies. Furthermore, it is to be noted as positively that the measures are based on scientific evidence (work-ability-index, fundamentals regarding the

organisation of shift plans and working time, knowledge of heterogeneous needs and performance parameters in older age) as well as the circumstance that legal changes (increase of retirement age) are adapted: amongst others, an objective of the measures is to enable the employability for personnel to the age of 67 years. However, exit options, especially an advancement of partial retirement, furthermore play an important role for the company.

CASE 10: Schumann Haustechnik GmbH & Co.

25.11.2010

Summary

The company Schumann Haustechnik GmbH & Co. took up the topic “age management” in 2001 because of existential reasons. As a craft enterprise located in the East of Germany the company has massive problems with employee retention and the securing of junior staff. Through participating in a “demography project” the company was encouraged to regularly exempt employees for qualification, to enable some employees the option of retraining to less burdensome workplaces in the sense of a “career development”, to introduce auxiliary devices and organisational facilities to reduce loads at work and to invest in the development of leadership skills. In a long-term perspective changes arose in transfer of knowledge and career development (which have been reduced later due to a lack of personnel capacities) as well as in the qualification and support of health-related behaviour (which have been extended).

1. Organisational background

Criteria	Parameter value
Size (employees)	- 8 (incl. director, without apprentices)
Sector	- Construction
Works council	- No
Business volume	- 945,915 €

The company has existed since 1995 and operates in the fields of sanitation, heating, ventilation/ finishing trade, maintenance work and after sales services.

The company specialized on the installation of solar systems, heat pumps, handicapped accessible bathrooms and swimming pools. Customers are public entities or private clients.

Currently, there is one female person amongst the eight employees, two persons work in administration, one of them works part-time. The full-time workers normally are away on business for 10 hours including driving to and from clients. The tasks of the white-collar workers include secretarial work and financial and payroll accounting. The after sales service fitter can freely dispose his work. The director works on 6.5 days a week between 12 to maximum 20 hours for the company and handles customer acquisition, the preparation of offers, support and accounting.

5 of the 8 employees (= 62.5 %) are aged 50 years and older, two persons are aged between 30 and 49 years and one person is younger. Two of the persons aged over 50 years work in administration department. Currently, two apprentices still work in the company; on average yearly one apprentice is trained as “HVAC system mechanic”. The average job tenure of the 7 employees (= without director) is 7 years. Compared to the personnel situation in 2003, staff has shrunk and aged considerably:

Age group	2003	2010
to 24 years	- (+ 1 apprentice)	1 (+ 2 apprentices)
25-34 years	2	-
35-44 years	8	1
45-54 years	2	1
55 years and older	-	5
Sum	12	8

Between 2008/2009 and 2009/2010 the turnover of the company increased from 800,597 € to 945,915 €. The company was not affected by the financial crisis.

2. Original measure

Criteria	Parameter value
Target groups	- All workers
Type of measure	- Training and knowledge transfer - Career development a. mobility management - Flexible working practices (job rotation) - Health protection and promotion a. workplace design - Redeployment and retention - Other (improvement of social skills of managers)
Social partners involved	- no
Scope of measure	- overarching

In the years 2001-2003 the company participated in the „demography initiative“ in Saxony-Anhalt under the conduction of the “Bildungsverbund Haustechnik Sachsen-Anhalt e.V.” (= registered society of Saxony-Anhalt training association for housing technology). This was the starting signal for the company to deal with the topic of demographic changes, the extent of which had already become apparent to the company then. The final report listed on 8 pages following problems at the start of the initiative:

- Low employee retention of fitters;
- Difficulties regarding the recruitment of junior staff, resulting on the one hand in insufficient manpower supply and on the other hand in a deficient preparation of apprentices for the apprenticed vocation resulting in frequent drop-outs;
- The lack of development perspectives for employees due to missing differentiated personnel management.

One of the measures taken up with the demography initiative was the further training of a journeyman to after sales service fitter, who is responsible for customers' installation maintenance and scheduling. Thereby, job rotation can be realised which allows a longer

duration of employment. The further training was designed on the basis of a qualification plan which besides the reduction of workloads also aimed at individual development. Furthermore, one colleague received further training to become an electrician for heating and sanitation who will be able to lay cables and to connect radiators without calling in an electrician. Thus, an employee who was impaired by a disc prolapse could continue working in a health-supporting way. Retrainings were also important against the background that the mixture of tasks from formerly separated apprenticed vocations sanitary professional and heating professional had become standard.

Through the demography initiative, the director realised the importance of social skills and adequate communication in leading employees and he invested in staff motivation by showing higher appreciation and more understanding and by organising team-forming measures (barbecue, excursions). With this he hoped to raise employee retention. In addition, the director received different forms of further training in the fields of management methods, economic knowledge and computing. Regular qualification of all employees regarding professional/ technical skills and commercial know-how was also realised as important element in the sense of “lifelong learning” (see also chapter 4). Formerly, the director focussed on attending further training measures himself and to pass on know-how to employees until he realised that the best way to implement knowledge is by giving workers opportunities to experience it on their own. Moreover, it was invested in better working conditions and auxiliary devices. Thus, for laying pipes no heavy copper tubings are used which formerly had to be brazed together, but lighter plastic composite pipes which can be pressed together. The employees do not work in building shells anymore, which had no windows installed, in order to avoid the typical loads draught and coldness. (Due to the fact that finishing trade can take action only when building trade has raised a building, there is no discontinuity of work during winter and correspondingly no winter insurance.⁶) Specialisation in the direction of solar systems and heat pump technology has opened up easier operational areas for older employees. Electric carts are used so that heavy radiators would not have to be carried upstairs.

3. Age management practice

In the following, measures of age management, respectively of personnel management are depicted which are not directly connected to the measures described in chapter 2 and 4.

Recruitment: Here, mainly over 50-year-olds aged persons are involved because there is no younger labour force available. The director appreciates older colleagues and perceives them as considerate and quality-conscious as they can better switch between various requirements, such as communication with customers, coordination of tasks, handling of “dirty” tasks at construction sites and “clean” tasks of sanitary installation. Finishing trade is neither subject to wage agreements nor to minimum wage regulations in building trade. This has an obstructive effect on personnel policy of the company as low wages in finishing trade in the East of Germany (11 €, compared with 13 € in the West of Germany as well as 15 € negotiated wage) have already induced many employees to quit and have aggravated the

⁶ The so-called ‘winter insurance’ is a seasonal short-work measure in construction during cold winters; the wages of constructions workers who can not be deployed at construction sites is then paid for my the employment agency.

search for new employees. Additionally, for school leavers that field is seen as less interesting and younger applicants often show poor qualifications.

Working time: There is a working time account, on which hours can be saved in peak times which can be taken off especially in winter. Besides the director, 1.5 full-time equivalent employees working two shifts from 7 a.m. to 5:30 p.m. Blue collar workers are out on business between 7 a.m. and 3:30 p.m., to be added are long commuting hours to customers, mostly from Lower Saxony, which are partly counted as working time.

Remuneration: Wage is not age-related.

Personnel exit: There is an extreme fluctuation after apprenticeship. An older employee quit his job and now works in an easier job as facility manager. The director estimates that after 40 years working in the company, the musculo-skeletal system suffers so that continuing to work is impossible. Main load is cold. The company has no experience with retirement so far.

4. Development of the original measure and current practice

Criteria	Parameter value
Status of initiative	- continuation
Target groups	- all workers
Type of measure	- training and knowledge transfer - redeployment and retention - health protection and promotion a. workplace design
Social partners involved	- No
Scope of measure	- overarching

The company continues to invest in the qualification of employees. Every employee attends 3-4 daily trainings a year which are mostly offered by suppliers (Buderus, Geberit, Hans Grohe), e.g. when new devices and technologies (fire and sound protection technology) are implemented. Lately, seminars on “soft” topics have also been offered – wellness, dealing with customers, good manners. The trainings are on latest methodical level and experience-oriented. Moreover, for three years, a free-lance work- and health protection coordinator has been offering health seminars on one morning twice a year. Required by law is one such a seminar per year. The need for subsidisation of a fitness centre has not been expressed so far.

Furthermore, the director invests time to motivate employees in order to retain them. Younger workers have to be shown limits more often while the older ones rather have to be “caressed”, to be treated well – in the meaning of not “mercilessly to run into the ground”, of allocating heavy work to younger colleagues and deploying two additional workers from another construction site for a short time when heavy parts have to be transported to a new construction site.

Compared to the initial initiative, following age management measures have been reduced:

- Advancement of employees to after sales manager and electrician (personnel capacities available have already been exhausted).

- Transfer of Knowledge: formerly, an older and a younger colleague always worked in a team of two. Now, 2-3 colleagues are working in a team but transfer of knowledge from old to young is not possible due to the lack of younger colleagues. It is only seldom possible to put together an apprentice with an experienced colleague, as apprenticeships are arranged with changing phases of school and vocation so that the assignment of apprentices cannot be planned reliably.

The director tries to retain apprentices by attractive offers (internship at a cooperating company in Northern Ireland). That was already stipulated in the final report of the demography-initiative in 2003, in order to learn operation methods in European countries and to improve market chances. For the future, the director plans rejuvenation through maintenance of apprenticeships as well as through public relation measures for the vocational field in cooperation with media – the qualification network Bildungsverbund Haustechnik Sachsen-Anhalt e.V., job fairs, press – and through continuation of personnel acquisition at schools. An intensified acquisition of girls for after sales service and maintenance work is also conceivable in future.

The success of the measures can be described as follows.

- The employees are more accessible and give better feedback;
- The employees enjoy work much more;
- The organisational structures are less hierarchical than before;
- Higher retention rates (through introduction of the first measures to improve leadership quality a massive exit of employees could be averted just in time);
- Employees are willing to work overtime;
- They are mentally “*on a higher level*”;
- Lower absenteeism rates (on average employees used to be ill 14 days per year formerly);
- Due to further training, journeymen could do more tasks independently and thus unburden the director.

On the one hand, the external impulse through the demography initiative and on the other hand the willing cooperation of employees turned out to be favourable for the implementation of the measures. The director classifies the missing rejuvenation as a failure, but has the opinion that it is a political task to establish the basis for an effective handling of demographic changes. This implies both the introduction of a minimal wage in finishing trade in the East of Germany and the reform of the apprenticeship system, so that the longest qualification blocks accrue in the first year of apprenticeship and later a reliable assignment is possible.

The company communicates with other craft companies at regulars’ tables as well as at industrial events and during training. For the transfer of measures to other companies, the director considers the following aspects as important: management by perception and with knowledge of human nature, a harmonic team with enjoyment of work and an occasional balance in the sense of a “*carrot and stick*” principle.

5. Concluding remarks from the researcher

In the company Schumann Haustechnik rather low-threshold measures were implemented (improvement of the leadership, introduction of auxiliary devices, paid leave of employees for free training). A more complex measure which would be suitable for the transfer to other craft companies is the retraining of employees to after sales manager and electrician as part of career development. Using possibilities of knowledge exchange with foreign companies within an international internship of apprentices can be recommended for emulation and could be more extended in direction of a knowledge transfer from young to old.

Further potential is to be seen regarding job rotation between maintenance and office work. Thereby, possibly the less positive circumstance could be improved that the director does not act as a role model regarding health behaviour – his workload is 12 hours on 6.5 days a week.

The measures seem to have a positive effect on retention of older colleagues. However, the success is limited in view of an almost half-way reduced number of employees since the “demography initiative”. In order to ensure success in the long run, changes regarding political and economic frame conditions (minimal wage, bargaining coverage of finishing trade) are necessary.

Contact:

Schumann Haustechnik GmbH & Co.

Detlef Schumann

Am Lindenberg 4

39638 Gardelegen

Tel.: + 49 - (0)3907-73 94 08

info@haustechnik-schumann.de

CASE 11: Wurst Stahlbau GmbH

25.01.2011

Interviewees: Human resource manager/ project manager health management, managing director (joint interview)

Summary

The medium-sized family enterprise operates in steel construction branch and is situated in a rural area which makes it difficult to recruit and to retain skilled personnel. In order to be prepared for demographic changes and to maintain health and motivation of employees, manifold measures were introduced under the umbrella term “occupational health management”: health- and sports offers, health check-ups, transfer of knowledge, development of management personnel, occupational reintegration management. A regularly conducted age structure analysis and employee surveys serve as basis for decisions regarding the introduction of new measure.

The measures implemented were successful: So, fluctuation rate is near 0 %, communication among colleagues and with managers have improved, costs of illness and contributions towards employer’s liability insurance could be reduced significantly. Currently, the managing director deals with the integration of “soft” factors in the economic cost-benefit analysis. Working life accounts turned out to be less successful measures as they aren’t used according to initial objectives for earlier drop-out but are paid out untimely.

1. Organisational background

Criteria	Parameter value
Size (employees)	- Medium-sized (180 p.)
Sector	- Steel construction
Works council	- No
Business volume	- Ca. 31 million € (2009)

Wurst Stahlbau employs about 180 team members in Bersenbrück and operates in the fields of steel construction, roofing, wall covering, windows, doors, turnkey construction for a variety of projects, such as agricultural halls, multi-storey car parks to refineries or power plants. For example, the company is responsible for the re-construction of the Weser stadium in Bremen und the halls of the Meyer shipyard in Papenburg. Recently, the company also operated in the photovoltaic sector.

The company was founded as family business in 1966 and started with 28 persons then. Currently, the company is managed in second generation. 5-6 persons of any age are hired per year.

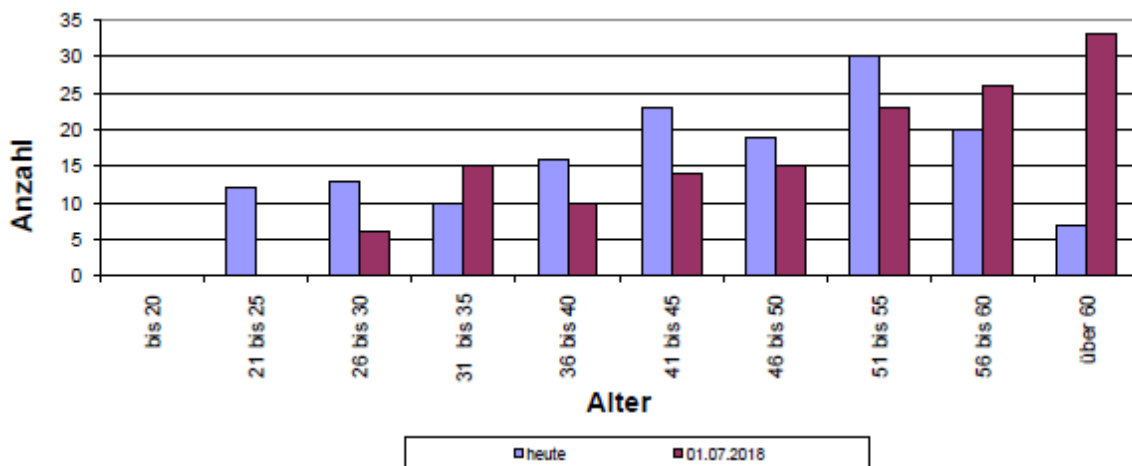
Personnel work in five different fields of work: construction, project handling, administration, manufacturing and assembly. Manufacturing sector is most strongly represented with 80 persons who work in 3-shift operation; assembly sector is second with about 40 employees. The administrative-technical sector employs one third of the entire staff. The share of women is about 8 % in this “heavy metal” sector, and at blue-collar workplaces only 0.1%. Two

employees work at the sales department in Senden. About six persons of either sex work part-time. Migration background isn't registered. Fluctuation rate is near zero.

2008 was the record year regarding turnover which reached 37 millions Euro. In 2009 the turnover reached about 31 millions Euro. The introduction of quality management was a drastic organisational change in recent time. Workplaces in manufacturing also changed through automation – forced postures are avoided, also regarding large components, through the purchase of lift- and transport aids.

There is no works council in the company. Initially, four persons from human resource department and management participated in the introduction of measures. Meanwhile the number of responsible persons has strongly increased and the new measures are implemented in a participative way.

The chart below shows the age structure in the entire company. It is to consider that the chart doesn't take into account apprentices, part-time- and low skilled personnel. The consideration of all 180 employees would show a rather balanced picture of the age structure, with tendency towards a compromised (middle-aged centred) age structure and an obvious increase of employees in older age groups until 2018.



2. Original measure

Criteria	Parameter value
Target groups	<ul style="list-style-type: none"> - All workers - Assembly workers
Type of measure	<ul style="list-style-type: none"> - Awareness raising, changing attitudes and diversity (with focus on health behaviour) - Training, lifelong learning and know-how transfer - Flexible working practices - Health protection and promotion and workplace design - Redeployment and retention - Employment exit and the transition to retirement

	- Other (regular age structure analyses)
Social partners involved	- No
Scope of measure	- All ages

In 2005, the motivation for the introduction of the measures was the interest in employee retention. As Wurst Stahlbau is located in a rural area with low pull factor the question of employee retention and recruitment arose rather early. It was registered that non-monetary incentives, such as maintaining of health and motivation of employees, could play an important role. The company came to this insight through cooperation with the AOK which formerly ran the actual “network SME competence” together with InQA.

The company regularly conducts age structure analyses according to company sectors by help of an own software. These showed that many employees in manufacturing sector have reached the age of 55+ and therefore it must be thought about succession plans. In particular, metalworker need after a 3.5 year training a further training period of 1.5 years; in technical and commercial sectors the training period lasts even longer.

The age structure analysis also gives information for further training planning. There exist a further training management and training schedules. “*People who are somewhat calmer, somewhat older*” are preferably sent to first aid courses or to courses about cargo safety for which conscientiousness is needed. The courses are accessible for all employees. There were also courses for junior management personnel, e.g. “today colleague, tomorrow superior”. Partly, further training is offered on voluntary basis, partly – as a result of ASA – it is obligatory in order that the company remains competitive.

The measures are headlined “occupational health management”. In line with this field of action there are amongst others the work groups “demography”, age-mixed teams”, “incentives” and in the past also “leadership and communication”. The work group “incentives” is concerned with the development of non-monetary incentives as there are only little positive effects from monetary incentives because of tax regulations facing the high number of singles in the staff. The work group “leadership and communication” was given up because the issues – the conduct of superiors, the behaviour of colleagues towards one another – became second nature to employees.

Know-how transfer is organised in line with the initiative. Knowledge carriers are persons who have both professional competences and “*considerable social competences*” which is ascertained through appraisal interviews and personal contact, e.g. a construction supervisor. Complex jobs aren’t communicable by courses or reference books but need 7-7.5 years of instruction (basic qualification, further trainings, practical experience, followed by 1-1.5 years of know-how transfer). An experienced employee aged over 55 years is assigned to a junior employee while taking into consideration “*good chemistry*”. The younger employee teaches the older person e.g. Outlook, the older employee makes the younger person accustomed to informal networks, shows workflows and delegates tasks to the younger employee. Organisationally, know-how transfer was supported by placing desks opposite and by shortening official channels (the younger employee is always part of official calls) as well as by joint order processing (both employees go together to customers). The younger employee leads report on what was learnt and at the end gets a knowledge tree which shows the knowledge transferred: roots are personal components, the trunk represents core

activities and the branches are actual tasks. Know-how transfer is conducted in about six teams in commercial and production sectors.

The key element of the initiative is occupational health management which consists of the three components prevention, treatment and aftercare. In the sector of prevention stress management seminars (also for managing personnel), back training and yoga were already offered. Every year new measures are suggested by a work group; employees can comment the suggestions in an employee survey which is published in the staff magazine. Corresponding measures are only offered after the needs analysis. This is also the case for job safety measures, such as choosing protective clothing or goggles which are tested by employees beforehand. A new measure in 2011 is "smoking cessation with partner". But because of the rejection of employees, e.g. a course for healthy cooking was dropped.

In line with aftercare reintegration management is practiced. The employee with a severe long term illness is informed in writing about possibilities and meaning of reintegration. There are no special adapted workplaces. Reintegration is realised by retraining, e.g. a fitter who cannot work at heights anymore is retrained to work at the production line. But there are also redeployments in opposite direction, e.g. employees who like diversified application areas and working outdoor prefer to work at construction workplaces. The basic training is the same.

There are also health check-ups. So called G-examinations are obligatory, e.g. test to check altitude suitability, a stress- and eyesight test. Moreover, health examination is conducted in the "AOK bus" (hearing- and eyesight test, blood pressure, functional tests performed by a public health fund). This check-up can be used by all employees and serve a sensitising function; the results remain confidential. The company also uses the "fitness vehicle" of the Centre of Competence.

The attempt was started to implement a work-life-account model. Employees at construction workplaces who regularly work 37 hours per week can work some hours more per day if they are sent to work in another town anyway. Collective agreement stipulates compensation at 165 accumulated hours. However, the company took out insolvency insurance, so that e.g. retirement would be possible ten months earlier when 1,600 hours are accumulated. In practice, employees prefer to get the money paid out.

3. Age management practice

In the following, measures of human resource policy are described which are not related to the measures mentioned above. In general, human resource policy of the company is age-unspecific.

Recruitment: 5-6 persons of any age are hired per year.

Further training: see chapter 2.

Career development: A master school or business administration course is paid by the company for selected employees so that they can be appointed to department manager positions.

Flexible labour organisation: Construction workers work in partly autonomous groups with 3 persons per group. At production lines, job sharing is practised between two halls while work tasks remain the same.

Job safety: Major accident hazards are pulled ligaments or foreign objects in the eye (metal dust) despite of safety goggles. In order to reduce dangers of accidents in future employees test various models of safety goggles as well as other safety and technical equipment (e.g. ergonomic PC mice) which are ordered then. The company is working on the integration of job safety into occupational health management. There is also a company doctor who works several hours in the company. In the past, also some serious accidents happened.

End of working life, transition to retirement: two persons requested partial retirement, which is regulated by collective agreement. Currently, the prolongation of the collective agreement is at issue. In general, employees start with partial retirement at the age of 58-59 years and pass over to the passive phase of partial retirement at the age of 60-61 years. The normal way to exit is regular retirement. In future, big problems are foreseen with fitters who will have difficulties to remain in the company until retirement age, but who do not want to use working life accounts for an earlier exit on the other hand. It is argued that the pension insurance carrier should inform employees in the yearly pension information how low their pension would be in case of early retirement in order to encourage them to save hours in the working life account. The company is open for the continuation of employment beyond retirement age but there haven't been such cases so far. In assembly sector, the team is younger and no one has reached retirement age so far.

Work-family balance: Eldercare is currently under development, requirements are solved according to individual cases so far.

Gratification: there is a company pension scheme in form of deferred compensation which is hardly accepted by employees. There are above-tariff allowances concerning rights of continuance, boni payments for all employees when the company reaches certain objectives, health boni for departments which managed to reduce their sick leave, and also group-related project boni when projects are carried through successfully.

4. Development of the original measure and current practice

Criteria	Parameter value
Status of initiative	<ul style="list-style-type: none"> - Continuation - Partial abandonment
Target groups	<ul style="list-style-type: none"> - All workers - Assembly workers - White-collar workers
Type of measure	<ul style="list-style-type: none"> - Training, lifelong learning and knowledge transfer - Flexible working practices - Health protection and promotion and workplace design - Redeployment and retention - Other (cost-benefit analyses)
Social partners involved	<ul style="list-style-type: none"> - No
Scope of measure	<ul style="list-style-type: none"> - All ages

Measures in the fields of knowledge transfer and occupational health management are continued.

In 2010, the wing of a building was rebuilt and in this course white-collar workplaces were equipped with ergonomic furniture, e.g. eye-friendly computers, height adjustable desks, ergonomic office chairs. Ergonomic PC mice were ordered to be tested but weren't accepted by employees. At blue-collar workplaces, the concrete floor was improved, standing aids, shock absorbing mats and transport assistances were used.

Work-life-accounts are still offered; however, employees don't save hours but prefer to get them paid out. The human resource manager assumes that savings attitudes may improve with the increase of households with double income. Another measure which wasn't accepted was the planned cooperation with fitness studios (there weren't enough enrolments, opening hours didn't match with shift times and financial grants were too low). Now, employees get cost reimbursements for health measures (back training, yoga) when presenting certificates of attendance so that courses can be realised at any place desired. The human resource manager regards this measure as an example for work-life balance, as this way attending sports courses can easier be adjusted to pick-up times of children from the kindergarten. This measure is well accepted.

The initiative turned out to be successful as there is almost no fluctuation and several apprentices can be recruited every year.

Occupational health management is an omnipresent, lived topic. There are information points in the company; dates are published in staff magazine; to get doubters "on board" they were integrated in the workgroups. Successes: since introduction of occupational health management, lower contributions (reduction of 20,000 €) to employer's liability insurance association have been paid by the company because of fewer accidents. The main objective of the initiative was reached – the improvement of health and the motivation of employees. The stress management courses relaxed employees, and the collegial interaction as well as relations between management personnel and employees were improved. As side effects, employee retention and attractiveness of the workplace for new employees have improved. Currently, the company is developing a controlling instrument to evaluate the success of measures. Up to now, a full costs analysis or "balanced scorecard" was conducted which measures "hard" factors (convertible to money), such as reduction of sick leave, of accidents at work, of fluctuation and of recruitment costs of altogether 170,000 € per year. This is opposed by an investment amount of 40,000 € → result is a return on invest of 1:4.25 €. By regular employee surveys, "soft" factors, such as job satisfaction, working atmosphere and motivation are determined which will also be integrated in the balanced scorecard in 2011.⁷

The initiative is carried on and will continuously develop. Every year, persons responsible bring along new ideas from various conferences, e.g. "Change 2009" attendance ended in a possible cooperation with professor Ilmarinen. In the result, age structure analysis shall be linked to work-ability-index in order to enable a better personnel planning for the company and a concrete future planning for employees. Moreover, a "workability coaching" shall be offered on voluntary and confidential basis.

Key factors for success are commitment as well as role model of persons responsible (the human resource manager attended the first smoking cessation course) and on the other hand pursuing measures with emphasis. The human resource manager explained this with an example: if employees would be nothing but encouraged to attend any health course, only

⁷ Analyses of editor A. Brillen show that integrating "soft" factors results in a return on invest of 1:18.59 € (*CoC Ticker* January 2011); the managing director himself arrived in tentative analyses at a ROI of 1:10.

few employees would decide to participate. Thus, the company at the same time offers this course and urges employees to give a statement if they will participate or not.

The company was one of the first with the early insight that demographic development in the region will cause problems regarding junior recruitment, and therefore the measures implemented responded to these circumstances.

A transfer of measures is possible to companies of any size, provided management supports measures with conviction, appreciates employees and has a lot of staying power. In contrary to the handling in other member companies of the AOK network, Wurst Stahlbau did not stop measures after two years when improvements couldn't be registered in surveys regarding working atmosphere and "hard" factors. Despite of missing effects, the company continued measures and successes could be seen then in the fourth year after introduction.

5. Concluding remarks from the researcher

The measures in the company are an example for a holistic approach of age management, even though they are headlined "occupational health management": working-time accounts, knowledge transfer, occupational health management, reintegration, further training and leadership (but the last two fields of action without special focus on ageing workforce). There is also no age restriction regarding recruitment of employees. Despite of the lack of a works council the measures are implemented in a participative way; remarkable is the orientation of measures to needs (employee survey to find out if a certain measure shall be implemented, testing of products by employees) and to results (controlling shall be completed by "soft" factors; regular employee surveys show a change of these factors over the time, also the work-ability-index shall be executed every few years in future). The interviewees repeatedly pointed out a win-win-situation which can be a motivation for other companies (also regarding the cost-benefit aspect) to deal with this topic:

- The workability-coaching enables employees to reduce pension deductions by later exit and the company to use the know-how of employees for a longer time;
- Career development from worker to department manager allows employees advancement and a position at physically (but not mentally) easier workplaces, and for the company an internal pool of skilled personnel is established.

The measures have a sustainable approach and are developing continuously.

Measures to reduce sick leave, such as sick bed visits and group-oriented health boni are to be seen positive on one hand as they offer a realistic perspective for the return to the company (sick bed visits) respectively strengthen the group and encourage solidarity (health boni). On the other hand these measures bear the danger of presenteeism.

The company is characterised by a low social distance between management and employees. The human resource manager pointed out that several family generations work at the company, that there are regular celebrations also with family members to which many employees would come, and that possible deficiencies or problems of employees are identified in interviews or during business inspections and solutions are targeted.

Contact details:

Thomas Sperveslage, human resource manager

Thomas.Sperveslage@wurst-stahlbau.de

05439-9494-31

Thomas Wurst, managing director

Thomas.Wurst@wurst-stahlbau.de

05439-9494-0

Wurst Stahlbau GmbH

Sandstraße 41

49593 Bersenbrück

CASE 12: Kayser-Threde GmbH

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Interviewees: director of law, personnel und infrastructure, chairman of the works council (joint interview)

Summary

The high-tech-company has been dealing with the age of its employees since 2005. The process was initiated by a project of Bavarian metal and electrical industry „Mit Erfahrung Zukunft meistern“ (“Coping with future challenges with experience”). The initial motivation to deal with the topic was the interest to learn about the age structure of the company and to find out if any future risks might result thereof. The result from the project was on the one hand to realise that the age structure is “middle-aged centred” and that a development in direction of an age-centred structure had to be prevented. However, on the other hand it became obvious that the company had a very good starting position regarding health-related loads, motivation/ identification with the company and staff performance, including older employees. Thus, the company concentrated on maintaining this high level. Lately, the focus shifted from an age-related (e.g. the project workshops were mainly attended by older employees) to a life-course-oriented approach. In opposite to the initial emphasis of the project, the measures implemented in the company were not only reduced to the fields qualification, knowledge transfer and human resource development but also focused on flexible working time models and health promotion.

1. Organisational background

Criteria	Parameter value
Size (employees)	- Large (250 persons)
Sector	- Manufacture of computer, electronic and optical products (C26)
Works council	- Yes
Business volume	- 58 million € (2010)

The company was founded in 1967. The company is a contractor for publicly funded projects in research and product development in the field of space flight (main topic: optical earth viewing). In 2009 an affiliate was sold and the company employed only 207 persons then. But in the following, about 50 persons were newly hired so that the number of employees again is at the level of 2006. Currently, the company is strongly growing. Since 2007 the company has been owned by the OHB-Corporation which is headquartered in Bremen.

32.4 % of the employees are aged 50 years and above. Most of the employees (60-70 %) have a university degree or PhD, mainly in physics or engineering. Therefore, they join the company at a relative high age. The only blue-collar workers, including apprentices, work in the kitchen. 20 % of the employees are women. About 20 % persons have migration backgrounds (regarding native country respectively citizenship) and come from 27 different

countries. About 40 employees work part-time (= less than 35 hours per week). In addition to 250 core employees who are included in the age structure analysis there are 40 sub-contract workers who are not affected by the measures described as follows.

The company was not hit by the financial crisis. In 2010 the turnover was 58 millions; 60 millions are forecasted for 2011 and even 80 million in two years due to successfully acquired big projects which will run until around 2020.

In 2007 the company was awarded the first prize “Unternehmen mit Weitblick” (= enterprise with foresight) and in 2010 the second prize “Bayerns fitteste Arbeitgeber” (= Bavaria’s fittest employers) concerning health promotion.

The level of unionisation is almost 0 % in the company. Since 2001 the company has not been bound to a wage agreement anymore und is represented by the OT-Association (OT = without tariff) BayME (= Bavarian Metal Employers). Up to 2001 the company was member of the Bavarian Metal Employers’ Association which was quit because the association intended to introduce the 40-hour week. The works council mainly consists of non-unionised members. Two representatives of these members were each involved in the conduction of workshops in line with the initiative as the objectives (improvement of working, prolongation of working life) met the interest of the works council.

2. Original measure

Criteria	Parameter value
Target groups	<ul style="list-style-type: none"> - Older workers - Managers
Type of measure	<ul style="list-style-type: none"> - Awareness-raising, changing attitudes and diversity - Knowledge transfer - Career development - Flexible working practices - Health protection and promotion and workplace design
Social partners involved	<ul style="list-style-type: none"> - Yes (but only employers’ association)
Scope of measure	<ul style="list-style-type: none"> - Age- and function-specific

In 2005 the company was motivated by the employers’ association to participate in the project “Mit Erfahrung Zukunft meistern” (“Coping with future challenges with experience”; abbr. MEZ⁸). One motivation to deal with the topic was the assumption that the company could be affected by demographic changes as well as the interest to carry through an age structure analysis. It turned out in the project that the company had “no problems with ageing” but yet the company wanted to take precautions. It was especially important for the company to increase attractiveness for applicants, to meet skilled worker shortage, to organise knowledge transfer and to ensure motivation and performance of the employees. Direct quote: *“What do we have to do, knowing well that it will become increasingly difficult to get young engineers on the market? And if that is the case, I have to conclude that I’ll have to work together with those I have as long as possible. That means, I’ll have to keep them fit*

⁸ Duration according to the website of the responsible institute f-bb: 01.08.2004-31.03.2008.

enough that they can continue working for a long time and do not have to quit earlier due to health impairments. That they still really enjoy working with us, are motivated, only this way I will get performance. In principle, this is in the firm's own interest."

The project led to the evidence that for the quality of workplaces, good leadership, load reduction, securing know-how, registration of skills and communication are of special significance. Therefore, three workshops were conducted with altogether 60 employees as well as with the entire management personnel:

- "Leadership in times of demographic change": sensitisation and training of the entire management personnel, information about demography, internal age structures and "demography-proof human resource policy";
- "Me and my job in 10 years": selected employees aged 50+ were asked for improvement suggestions and future perspectives, so that the workplace will remain attractive for them also in ten years. Improvement suggestions included flexible working time models, better options for further training, systematic knowledge transfer and better capacity- and work-planning;
- "Competence inventory": employees, mainly aged 50+, named currently and prospectively needed competences and ways to gain them. With the workshop the company wanted to ban the danger that an important area of competence could be lost because of demographic change.

As a result of the sensitisation through the project and on basis of the results from the workshop "Competence inventory", tandems were formed within management – a person aged 60 years worked together with a 40 years aged person by leading the younger for two years. Afterwards, a 'dual leadership' was formed and later on, roles were switched; in the end, the older employee retired. Similar tandems have been implemented in project management.

Another result of the project was the evidence that the company would have to take stronger effort towards trainings for management personnel and human resource development as this "*had not been so en vogue in medium-sized enterprises*" before. A new position for human development was created and a development programme for management personnel was introduced as new conflicts on the line young management personnel – older employees were expected to arise in the course of demographic change. Specialist careers for "*senior experts*" were also introduced who do not want to accept managerial responsibility but still would like to have attractive options for career development. These employees act as specialists on special topics (e.g. optics, electrical engineering) on which they are consulted inter-divisionally as neutral experts. For those specialist careers, employees are considered which have 10-20 years of professional experience. They are institutionalised career paths.

In cooperation with the works council, flexible working time models were implemented on the basis of working-time accounts.

3. Age management practice

Following, general measures of human resource policy are described.

Job recruitment: Only in 2010, almost 50 persons were hired. Many younger persons were recruited but also applicants aged over 55 and even a person five years before retirement

age. Their chances have increased remarkably due to the lack of younger skilled personnel – age is no criteria. Also foreign manpower is hired (e.g. directly from Italy, Australia or the USA). The company plans to implement a trainee programme. Not age but actual knowledge of employees is important for the company as its products are used irrespective of age. Older employees react calmer and more confidently while younger employees are more familiar with modern techniques. In future, the company wants to take more action in the fields of employer branding and image building in order to become more attractive for the younger labour force but also to encourage persons aged 55 years to apply for jobs. That topic was also inspired by the above described MEZ project.

Career development: Dealing with the topic of demography in line with the MEZ project resulted in the creation of a position for human resource development and in the introduction of a development programme for management personnel. A job enrichment model exists in line with human resource development: younger managers are integrated in the board of management as secretary for one year. In line with human resource development, the age structure analysis is continued and supplemented with a focus on foreigners and women.

Training, lifelong learning and knowledge transfer: Further training is a topic of annual interviews. Further training is offered in three ways: On the one hand, project-related and management training is initiated by human resource management. On the other hand, technical “*tool*” courses are launched for daily practice. Moreover, employees express own wishes concerning further training which the company tries to realise within the financial frame, whereby employees use their spare time in line with flexitime. (Concerning knowledge transfer, see also chapters 2 and 4.)

Flexible working practices including work-life balance: core working hours are 35 and 40 hours per week. There is flexitime as well as working-time accounts for stepwise employment exit (see chapter 4). A flexible practice of work organisation in the sense of job rotation is realised by parallel working on 2-3 projects which prevents workers from “*single-directionality*”. Regarding the balance between childcare and job an allowance for child care in day-care centres was implemented in 2011. The balance between care-giving and job is not featured on the agenda so far. An allowance for elder care would be conceivable for the future; corresponding wishes were already expressed by employees. Flexible organisation of working time has been extended step by step.

Health management and workplace design: Advantages of the “*brain power driven*” company are challenging, changing activities and the lack of physical loads which in principle allow the continuation of working also for physically disabled employees. Between “*eight hours in front of the monitor*”, three days with meetings are positioned so that movement changes. Therefore, workplace design is reduced to the allocation of height-adjustable desks or standing desks if needed, to the purchase of new glasses, to eye-friendly monitors or to special chairs in cases of back complaints. It is also paid attention to maintain both well-being and performance of employees with the help of workplace design. In line with legal obligations, an external company doctor is assigned, besides there is a health promoter working on part-time basis who is adjoined to job safety.

Remuneration: Every year an appraisal interview is conducted during which the wage adjustment from the 60th age on is made a subject of discussion (see chapter 4). Regarding profit distribution the superior is free to decide on the amount he wants to allocate to each employee.

Employment exit and transition to retirement: Up to 2001, the company was bound the collective agreement on the part-time retirement scheme. About 5 persons made use of it. For 3-4 years now, the option of gradual exit (see chapter 4) has been offered. Normally, an early exit is not desirable for the employees due to the interesting jobs; besides, there are almost no health-related loads. In the past years, 1-3 employees per year have left the company for age-related reasons.

In addition to the documented measures, the company tries to respond to individual wishes of employees, e.g. concerning the balance between family and job or two-month sabbaticals accompanied by voluntary wage restraints (the latter is gladly used by an employee aged over 60 years for regeneration).

4. Development of the original measure and current practice

Criteria	Parameter value
Status of initiative	- Continuation
Target groups	- All workers - Older workers - Workers with high level of competencies
Type of measure	- Recruitment - Training and knowledge transfer - Career development - Flexible working practices - Health protection and promotion and workplace design - Remuneration - Employment exit and the transition to retirement
Social partners involved	- No
Scope of measure	- Age-specific - overarching

The measures developed on basis of the MEZ project results (knowledge transfer, career development, flexible working time models, occupational health management) have basically been continued respectively extended. Only the sensitisation of management personnel was finalised. Whereas the initiative was age-specific in the beginning, now it is more life-course-related, addressed to employees of any age and preventively oriented. The following factors are regarded to be crucial for the maintenance of performance and well-being in older age: motivation, working atmosphere, high self-responsibility and flexibility at work.

Knowledge transfer will become more important in future, especially in leading positions. In these positions, knowledge transfer takes about two years. There is no formalised approach, transfer functions through „working side by side”, giving up individual fields as well as introducing the successor to customers. In a latest case, a manager aged over 60 passed on his tasks to his 50-year-old successor and withdrew to the position of a skilled employee which meets more his current interests. Knowledge transfer is also realised in work groups. The compilation of a knowledge management database is planned for the future which shall

be a kind of keyword dictionary and serve internal exchange. According to the works council, however, an assessment of employees' skills must not take place, the danger of downgrading has to be prevented and only "hard skills" should be recorded.

Flexible working time models were extended. One of the models (introduced 3-4 years ago and codified in a works agreement) enables a gradual exit from working life: five years before retirement, the employees work one day less per week, in the second year two days less and so forth. However, some of the employees increased their working hours after retirement as they were needed in their department. The company considers the sensitisation of employees for these models as advantageous. Remuneration is adjusted individually (there are partly compensatory wage increases for employees who earn less). Partly, the stepwise exit is used for knowledge transfer.

Health management is seen in the company as one of the most important levers to maintain the performance in older age. The measures are continued as they are well accepted by the employees. Emphasis is put on ergonomic changes and auxiliary devices (see chapter 3), sport promotion and healthy nutrition. Back training is offered every Wednesday. This year (2011), a skiing weekend for 70 persons was sponsored as team development- and health promotion measure. Moreover, sports groups (soccer, squash, badminton, tennis) which are self-organised by employees are subsidised. Once a year, a 'health day' is conducted with a particular focus (e.g. eye pressure, intestinal cancer, nutrition). The canteen offers fresh food, a large salad buffet and every day a vegetarian dish as well as once a week only vegetarian food. Nutrition is considered as the most important measure of health promotion in the company. Unfortunately, the employees still prefer unhealthy food. There are also offered influenza virus vaccinations. Currently, the company participates in a pilot project of the University of Stuttgart which aims at the improvement of physical fitness through simple measures in everyday- and working life, e.g. doing without car or elevator, and which measures the resulting changes of physical parameters. The company's approach regarding health management is described as follows: *"You motivate the employees to participate. But finally the employee – and we will not take this away from him – has to be responsible for his own health. These are only suggestions which we bring into the company."*

Workplace design is continued focusing the improvement of well-being. For example, rooms are rearranged correspondingly or comfortable lighting is provided. Rooms with up to 6 employees will soon be divided.

It is possible to continue working also after retirement based on contracts for work and labour. For example, one employee aged 68 continues working. Neither for the company (high costs) nor for the employee (low pension increase) continued work based on a contract is interesting.

According to the company's philosophy, it has to be ensured by the enterprise that an older employee remains as efficient and productive as a younger one. The company discusses flexible wage adjustment beginning with the age of 60 in order to maintain older employees as attractive as younger employees with the same performance, and thus wants to secure workplaces for older employees. As agreed upon with the employees, salary increases after 60th year of age are held low (e.g. 1 % compared to 4 % for younger employees). A higher salary increase is not regarded that interesting and necessary by the older employees.

The project was not conducted with the purpose to reach an aim but to realise the company's position regarding age structure and to find out if problems could arise from that in future. The project raised the company's sensitisation for the topic and showed where improvements could be made. There were already good preconditions in the company – a high level of job satisfaction, interesting workplaces without physical loads, and, in addition, a relatively young staff due to the young age of the company. Improvements were made selectively in the fields of working times, health promotion and individual wishes of employees. The aim was to maintain the level. Anyhow, it is regarded as a success that since 2006 the age structure has not developed from middle-age-centred to age-centred, in opposite to initial assumptions and despite of the increased share of older employees (from 18 % to a third of the staff).⁹ The shift could be avoided through hiring many junior employees.

Raising retirement age has had no effects so far on internal situation as there was the option to employ persons after retirement with a new contract already before.

Transfer options basically exist in every company provided there is willingness to consider own weak spots, to sensitise management personnel and subsequently to initiate individual measures. Transfer could be conducted regarding e.g. gradual retirement, competence transfer or workplace design at office workplaces. However, identification with the product is not that easily to be established in every company as in Kayser-Threde which produces 'hip' satellites. For this reason, dealing with employer branding and image building in future will play a determining role for maintaining motivation and performance.

5. Concluding remarks from the researcher

The measures at Kayser-Threde are an example for an integrated, preventive and low-threshold approach. For example, the offers of health promotion or case-by-case and not documented regulations according to individual wishes of employees have low-threshold approach. The initiative is also an example for the development from an age-related to a life course-oriented approach. First, the measures were decided in a top-down method with help of management personnel but in the following, they were conceptualised in participative way (workshops "Me and my job in 10 years", "Competence inventory", financial grants for self-organised sports groups). Innovative measures are the planned knowledge database, gradual retirement as well as discussions about gratification adjustment beyond the age of 60, in order to maintain attractiveness of employees for the company. Compared to a company which acts under economic pressure, it is easier for Kayser-Threde to continue the measures due to a momentarily good order situation (planning reliability until 2020 due to decades-long projects) and the good starting position in the company regarding health-supporting workplaces, integrated tasks, remuneration and load changes.

Contact:

Gerd Bräunig – Director of law, personnel und infrastructure
Kayser-Threde GmbH
Perchtinger Straße 5
81379 München
Tel.: +49-(0)89-724 95-234
Gerd.Braeunig@kayser-threde.de

⁹ In „MEZ-Bericht“ (BayME, VBM, 2008) the former age structure was described as fraught with risk, too.