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‘ACTIVATING SENIOR POTENTIAL IN AGEING EUROPE (ASPA)’

WP4 – Case Studies in Labour Organisations - Deliverable 4.3

**Integrated Final Report on Organisational Case Studies
and Good Practices in Age-management**

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The ASP.A Project

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The ASP.A Project aims for an examination of the forces and mechanisms behind employers', civil society organisations' and governments' behaviour towards people aged 50 to 70, and of the resulting societal arrangements. In particular, the aims of the project are threefold:

- To get insight into the influence of organisational behaviour, organisational and public policies on the use of senior potential (men and women) over fifty;
- To get insight into activity rates of people between 50 and 70, both in paid labour and unpaid activities (in particular care and volunteer work), related to policies with respect to human capital investments over the life course;
- To identify policy strategies for organisations (firms and civil society organisations) and governments to stimulate the participation of older adults and secure human capital investments over the life course based on a comparison of different national strategies and good practices at the organisational level.

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1. Introduction – Aims and Objectives

This report presents the final results of Work Package 4 (WP4), *Case Studies in Labour Organisations*, of the ASPA project. The integrated report is based on 8 National Case Study Reports from Denmark, France, Germany, Italy, Poland, The Netherlands, Sweden and the United Kingdom, which have been delivered separately (see Deliverables 4.2). The national correspondents are thanked for providing the underlying case material.

This introductory chapter starts with reviewing the basic aims and objectives of the study and central conceptual issues. Chapter 2 considers the methodological issues that arise in pursuing the approaches adopted in primary data collection, e.g. in selecting, accessing and documenting the case studies. The central part of this report consists of four chapters dealing with the main findings concerning age management in practice produced in the study. Chapter 3 summarises insights from the good practice case studies, taking each key dimension of good practice in turn and drawing on cases without seeking to locate them in any wider socio-economic context. Chapter 4 explores insights from the case studies regarding similarities and differences that relate to organisational size, sector and country, recognising that these can only be suggestive, given the (deliberately) non-representative sample of cases selected. Chapter 5 introduces the notion of „pathway of practice’ in which the focus is not on „destinations’ of good practice but on the narratives of change which may or may not lead to sustainable good practice. Chapter 6 then looks at the underlying *drivers* of age management relating them to their ways of influencing pathways and the organisational policy dimensions involved and the good practice associations. The final Chapter 7 summarizes the main results and draws some conclusions on how to view and promote age-management further. Illustrative case studies are referred to throughout the text – the interview guidelines are given in Annex 1, a comprehensive list of all case studies involved is given in Annex 2 and their allocation to pathways of practice is given in Annex 3.

Aims and objectives

The major objective of the study was to develop and analyse an up-to-date portfolio of examples of good practice that takes into consideration two goals - maintaining the employability of ageing workers and improving work opportunities. Thus, it was intended to provide an information base on age-management suitable for an international exchange of experiences on how to promote labour market participation of older workers in general and how to prevent early exit and unemployment. The intention was to inform debate in the European Union about age and employment and raising labour force participation rates of older workers by providing practical workplace-based examples and to contribute to the further development of age management in both public and private sector organisations.

In combination with the representative survey of employers’ attitudes towards an ageing workforce and the foreseen policy analysis in the ASPA project this data base should form a strong base for assessing the current state of affairs concerning integrating older workers in the workforce.

The research was intended to assess critically the extent to which firms are oriented towards older workers and explore how age-aware human resource management practices can be used to improve the employment prospects of older workers. The study aimed at assessing good practice examples which promote the recruitment, retention, and employability of workers as they age, with an emphasis on the employment of older workers. The main objectives as already stated in the project proposal were:

- Document measures in organisations (private and public) to improve the employment situation of older workers.
- Identify and re-assess factors influencing the evolution, success and sustainability of measures over time.
- Identify the main dimensions and scope of examples of good practice and analysis of significance.
- Consider the impact of initiatives on individuals and organisations.
- Analyse the perspectives of social partners and systematise their views on how to sustain the employability and workability of ageing workers.
- Link company approaches and initiatives from social partners with recommendations for implementing public policies both at EU-Member-State-level and at EU-level itself.
- Disseminate models of good practice in age-management and lessons to be learned from the implementation.

In particular, the study aimed to examine factors influencing outcomes of initiatives to improve opportunities for older workers and to extend working life from a longitudinal perspective. In the context of revisiting former case-studies in the longitudinal part of research, the main purpose is to re-assess the influence of the drivers identified so far. The following questions guided the analysis of the case-studies:

- Are business cases under pressure and is sustainability endangered in times of economic recession – concerning in particular recruitment, retention and phased retirement models? Good economic circumstances may have had a positive influence on the sustainability of measures. But this does not necessarily mean that measures will end when such conditions no longer apply.
- Has demographic pressure gained influence? Concerns over future labour supply, sometimes linked to changing demography was of considerable importance only in some case organisations in the former studies. Over time, changing demography set against concomitant shifts in labour supply, ongoing industry changes and a changing public-policy framework may force organisations to much more consider workforce ageing as a strategic issue. Have managers therefore strengthened their efforts to find effective solutions to make use of older workers and to plan accordingly?
- Does the increasing implementation of pension reforms and does the rising retirement age trigger an increase of good-practice in age-management? In this respect, do national differences prevail and does the role of workers' representatives increase? In recent studies, there was relatively limited trade union involvement at the conception stage, yet, their role could be crucial in securing or undermining the commitment of staff.
- Has there been a shift and/or convergence on the company level concerning a trend towards comprehensive approaches? And have certain sectors – like the public sector - gained ground?

From a more comparative view, the study examined whether common, cross-national characteristics of good practice in age-management have developed or whether specific national case-study profiles prevail and what are possible reasons for this, e.g. industrial relations and policy initiatives.

The project has also tried to stand back from the conventional studies of „good practice’ and to develop a complementary methodology for both seeking evidence of the experience of practice and analysing it. This has led to a second element of the WP4 work package which analyses the cases from the point of view of *pathways* of practice rather than good practice *destinations*.

It should be noted that not all the above research questions can be answered simply by one work package alone. Addressing them fully will require further research involving mature reflection on the outcomes of other work packages.

2. Methodology

2.1 Some general considerations

One of the lessons of research funded by policy actors in Europe is that good practice cases on age management and its various equivalent sets of ideas are much easier to describe in particular contexts than to promulgate as transferable models of more general relevance. Another lesson is that good practice cases relating to age management are hugely conditional on the underlying socio-economic situation as well as the social welfare policy environment. The latter policy environment deals with issues relating to education and training, unemployment, sickness, health and retirement and their interactions with the usual dimensions of labour market disadvantage: age, gender, race/ethnicity, disability and, more recently, sexual orientation.

In international comparative work, where socio-economic situations and policy environments differ enormously, the search for „good practice cases’ is particularly problematical. Such projects often essentially encompass „good-enough practice’ in at least one area of age management and avoid organisations that clearly show a collection of bad practices. The compromise is due to the multiple aims of, especially, EU institutional funders:

- identification of good practice exemplars and the dissemination of information about them to practitioners,
- codification of new knowledge about the relevant factors likely to affect age management in different countries (especially new Member states with poorer quantitative and qualitative data available),
- exploration of developing cases that might lead to good practices and the contrasts between countries-sectors in their incidence,
- creation of broader-based international research capacity in the field.

Adjusting the focus of ‘good practice’ studies

So, an important methodological issue in the field of policy-orientated labour market research is how to explore „good organisational practice’ in such a way as to avoid pre-empting the rigorous analysis of its social reality - the various senses in which and perspectives from which it could be seen to be „good practice’. Part of the problem stems from focusing on „good practice’ as a *destination* rather than an *approach to organisational learning which is most likely to lead to good practice* eventually. Another part is to abstract age management too much from other elements of policy, both HR-related and in other business areas.

However, it is too costly to survey organisations randomly in the hope of turning up pockets of good practice which can then be investigated in detail. In particular, „good practice’ research typically faces a problem of how to identify at least some good practitioners *ex ante* so as to avoid discovering belatedly - after considerable costs of gaining access have been incurred - that the practices are not so good after all. So various devices are used to cut the costs of discovery: look for organisations with previous involvement with research on employee relations and organisational behaviour, identify organisations with HR staff who are active in age management interest group networks, who speak at relevant conferences, etc. The problem is that such approaches can become too self-referential and lead to recycling cases without extending the body of cases sufficiently.

Trying to avoid the above outcomes and introduce a stronger element of study on the „pathway of practice’ pursued by the organisation involves combining two principal ways of approaching the collection of primary data on organisational behaviour (leaving aside the far more intensive ethnographic approach). The first would involve going back to previous case-

study organisations and seeking to re-interview them. The second would seek a retrospective narrative from a collection of case studies, accepting all the caveats attached to such reflections.

In effect, we need to construct organisational histories either through a form of ‚longitudinal‘ case studies and/or retrospective questioning, so as to situate the organisation in an evolving pattern of HR experience of organisational policy and practice. The two methods can be combined where the first is feasible so that then the recording of current practice can be compared with previous practice some years before and, between the dates of those responses, accounts of the pathways between them can be obtained retrospectively.

The entry point to research can be advanced by adopting a research design based on starting by re-visiting previously-studied organisations assuming their quality and coverage of issues are adequate and permission for follow-up access is granted. However, the representation of certain types of organisation in existing databases in the public domain and among many previous studies is low, notably for small and medium sized firms.

Shifting the focus somewhat away from examining good-practice destinations enables those researchers who are faced with country situations that are fundamentally more challenging to the introduction of age-management strategies to participate fully; this is because explaining why relatively little progress is being made acquires (almost) as much status in the research project as explaining how good practice has come about or is being pursued apparently with likely success.

However, the sample of case studies will still need to cover enough current and historical points of practice evidence that appear to reflect a consciousness of age-management issues, if not actual good practice.

Definitions of good practice in age-management

Good practice - enlarging on the concept of the European Foundation *Combating Age Barriers* project - can be defined as employment conditions of older and ageing workers which provide the environment in which each individual is able to achieve his or her potential without being disadvantaged by his or her age (European Foundation 2006). More concretely, good practice can be defined as measures which sustain or increase the employability and/or workability of the ageing workforce of a company and which effectively – as far as it can be assessed – extend working lives and postpone labour market exit for current older workers (cf. Lindley and Duell, 2006).

A major conclusion from recent studies is that active policy approaches at company level concerning an ageing workforce have to be preventive, avoiding age-specific employment problems by preventing the development of risk factors in the earlier stages of professional life. Active and preventive measures should take a ‚whole of working life‘ or ‚life course‘ perspective and be embedded in the concept of ‚age neutrality‘. However, there are still ‚age-specific‘ employment and employability-related risks to be addressed.

Good practice, then, is not a once-and-for-all achievement but a range of possible interventions, from minor to major, that reflect the aims of age management to overcome age barriers and to promote age diversity. This reflects not only differences in labour market contexts, sectoral contexts and attitudes of actors, but also the heterogeneity of older workers as a group.

Nevertheless, most recommendations to implement age-management in companies suggest that a comprehensive, holistic or integrated approach is most effective in the long run. In the

following the term “comprehensive” will be preferred which can be addressed as follows (cf. European Foundation 2006a):

- Emphasising the long term prevention of age management problems, such as the de-skilling of older workers and work-related health problems, rather than reactive problem solving.
- Focusing on the whole of the working life and all age groups, not just older workers.
- Ensuring a joined-up approach that brings together all dimensions and actors that contribute to effective age management.
- Changing attitudes within organisations as a whole to educate people about the need for age diversity.
- Ensuring, in the short term, catch-up provision for older workers who missed out on specific skill training or whose health was affected adversely by employment.
- Conducting regular strategic evaluations of age management policies and initiatives to assess their effectiveness.

Data show, that the particular example of good practice may be isolated, transient and co-exist with bad practice (European Foundation 2006, Lindley and Duell 2006). In other words, organisations do not pass a simple threshold or achieve a European kite mark for exemplifying good practice. For organisations with little or no experience in age management the main point is to get started in the implementation of good practice, however small-scale that may be, and then to try to build that into a more comprehensive strategy. In considering ‘good practice’ it should be noted that in some cases measures targeting older workers do not exist, yet companies retain them. In certain companies where culturally older workers are strongly favoured, little or no explicit policy making for this group can be observed.

However, defining good practice in age management is problematic, depending very much on one’s perspective. For instance, employers have on occasions reversed policies aimed at the inclusion of older workers, because they are deemed to be no longer useful or even as harmful to the business. The outcome has sometimes been the shedding of older labour. The perspective of managers on such issues will almost inevitably be quite different from policymakers, campaigners and the like. This should be a consideration when promoting the issue of the employment of older workers to business. If ‘good practice’ is defined simply as learning from others who have managed problems successfully then how actions will be perceived will clearly vary, over time, according to situation and to culture. This points to a crucial role for the social actors in interpreting messages for employers (Taylor 2002).

Finally, the notion of good practice has been criticised for promoting the ‘privatisation’ of equality. According to Dickens (1999), for many years the business case for equality action has been in the ascendancy, but there are reasons to view this as deficient (cf. European Foundation 2006):

- Such arguments have greater salience for some businesses than others
- Its appeal may vary over time leading to ‘fair weather’ equality action
- Partiality, in that action may only take place in areas where equality and the business case clearly coincide, or involve certain sub-groups of the target group, or where it is easier
- Results may only be observed over the long-term and narrow cost benefit analysis may undermine equality initiatives.

While the ‘good practice’ and ‘business case’ perspectives on equality remain popular, nevertheless cases where age-management has been implemented in its own right and for the sake of the humanization of working conditions – and with potential or real conflicts between the social partners – are of special interest as well.

2.2 Empirical Procedures

Identification of case studies and case study portfolio

The portfolio of examples of good practice (for details see Annex 2) constitutes a collection of work-place initiatives and was chosen to represent a balanced cross-section of larger and smaller enterprises and the public and private sector. According to the project proposal each partner country had to accomplish 12 company case-studies – that is 96 cases in total. The final outcome was 90 cases, of which 83 were deemed to contain good practice.

The identification and selection of established cases of good practice - to be used for the longitudinal perspective – was primarily built upon existing samples and data bases - predominantly, from the European Foundation data base (cf. European Foundation 2006). However, due to the fact that a significant proportion of these examples no longer existed or turned out not to be accessible to the researchers, other long-standing case-study examples were selected in consultation with the work package coordinators. In this respect, organisational case studies were obtained by using specific national databases of good practice examples (this applied to Germany, Italy, the Netherlands and the UK) and results of national competitions to identify age-management initiatives (Germany, Poland). In addition, for several countries, the databases of organisations which participated in the national WP1 employer surveys and consented to be contacted directly afterwards were also used. Particular efforts were made to draw on the latter in order to generate additional cases among SMEs and the public sector.

Data collection took place in the year 2010, with some countries starting earlier (Denmark, Sweden) and some adding case studies also in 2011 (France, Germany). This time frame is meaningful in two respects:

- first, the data base provides the state of the art in age-management for the selected cases mainly for 2010
- Although organisations in some sectors reported the worst part of the economic crisis was behind, many organisations indicated getting through the crisis was still their top priority.

Due to several reasons, the access to firms was inhibited and therefore, both the proposed number of cases by country and the desired balance of size and sector could not be met.

- As already mentioned, because of the still prevailing consequences of the economic crisis, the issues of age-management did not rank high on the agenda of companies and organisations. This was particularly true for Italy and to a certain extent also for Germany and the Netherlands.
- In other countries, for example, the UK, the term age-management was not in regular use and required some explanation before organisations saw themselves as suitable subjects for research.
- Due to current highly sensitive discussions on pension reforms or recently introduced labour market reforms firms were preoccupied with adjusting to these developments and had no capacity or taste for participating in other investigations. This mainly concerned companies in France.
- Whereas companies in the Netherlands often refused access because they felt over-researched – though there was no reason to presume that their initiatives were not still going on - in Poland, the issue of age management and policies towards older workers was unfamiliar to employers and there was general mistrust in getting „investigated.’

Table 2.1 indicates how many case studies per country were carried through and to which type (long-standing² or so far recent age-management initiatives) they belong. Because it was not always clear right from the beginning whether the selected age-management initiatives were still ongoing or did meet the given standards, some cases had also to be labelled as „no good practice/initiative ended’.

Table 2.1: Case studies per country and their duration

Country	Long-standing cases	Additional short-term cases	No good practice/ Initiative ended	Total number
Denmark	8	2		10
France	4	2		6
Germany	11	1		12
Italy	7	3	2	12
Netherlands	9	6		15
Poland	7	4	3	14
Sweden	3	6	2	11
U.K.	9	1		10
TOTAL	58	25	7	90

The selection of case studies had to strike the right balance between a longitudinal approach and the task of filling existing research gaps. This concerns mainly the lack of information for certain company sizes, in particular SME’s and for the public sector. Given the domination of large companies in previous case study selections, special attention was paid to incorporate small and medium sized companies (up to 250 employees) in the sample. Table 2.2 shows the results of this balanced approach concerning company size for those companies which had ongoing initiatives.

Table 2.2: Case studies per type and company size

Company size	Long-standing cases	Additional cases	Total
< 250	21	14	35
250 - 500	7	4	11
> 500	30	7	37
Total	58	25	83

² Cases were classified as ‘long-standing’ if they fulfilled at least one of the following requirements: 1) they have been already included in a database of good practice (e.g. at www.eurofound.org); 2) they have existed for at least three years and a development (in qualitative or quantitative terms) from the original to the current initiative can be tracked.

Smaller companies (<250) are represented quite well in total and almost match the representation of large companies. This has been achieved mainly by recruiting additional cases which were not documented so far.

Concerning the inclusion of the public sector, the identification and documentation of 30 organisations from the public sector can be seen as a success also (see Table 2.3). This may also hint to recent developments of age-management in this sector because 10 non-longitudinal cases could be identified. However, some country bias still prevails, with a particular high share of public companies to be found in the Netherlands and Italy.

Table 2.3: Case studies per type and sector

Company size	Long-standing cases	Additional cases	Total
public	20	10	30
private	38	15	53
Total	58	25	83

Case study documentation

Case studies involved at least one on-site visit to the respective organisation, and where possible, interviews with a range of organisational actors (e.g. senior management, line management, representatives of work councils/trade unions/employees and persons in charge of the initiative) were conducted in order to obtain as complete a picture as possible. If it was not feasible to conduct all the necessary interviews at the site visit, additional telephone interviews were made as well. Also, available documents concerning the company profile and the description and any internal assessments of the initiative were evaluated.

To ensure that each researcher would cover the necessary aspects of the case study, a guideline for the interviews as well as a common template for reporting and assessing the individual case studies was developed, discussed with all national partners and applied afterwards (Annex 1). On the basis of the interviews and additional materials collected from the organisations concerned, case study reports were written and are documented individually in the National Case Study Reports. Where possible, the case study reports were cross-checked with those interviewed.

Since, at the outset, anonymity was guaranteed to all respondents, it would have been inappropriate to press organisations to agree to identifying themselves if, for whatever reason, they preferred not to do so. Moreover, some researchers (e.g. the UK) preferred, on methodological grounds, from the start, that their cases should be reported anonymously on the grounds that poor experiences could be as valuable as successes and the essence of the „pathways of practice’ approach required maximum reflection rather than an impetus for public revelation. A compromise was reached that cases would be identified if both the research team **and** the organisation were in favour of identification.

Many agreed to be identified but several chose to stay anonymous. No presumption should be made as to the degree of „good practice’ achieved by organisations in either category.

3. Dimensions of Age Management

This chapter will describe successful measures per dimension of age management by taking recourse to long-standing or shortly established initiatives for the inclusion of (older) workers rather than to informal everyday practice. In line with earlier research, we understand as 'good practice' such policies and measures which are preventive in their orientation and take a life-course perspective (Frerichs and Lindley 2009). But also such measures will be taken into consideration, which address age-specific challenges in the employment phase.

Due to the different degree of depth in the description of cases, the selection of exemplary measures will not follow strictly defined criteria but will be assessed case by case. Possible criteria of choosing good practice examples which will be employed in this analysis are the following:

- fulfilment of objectives or positive side-effects (e.g. the increased exit age of older workers at *DK10 Post*);
- transferability of measures to other firms. Considering this criterion, either such firms will be chosen for display as good practice examples which are representative of a popular branch of the economy (and thus have working conditions comparable to many other firms) or which have good practice measures that can be easily transferred to other firms irrespective of the branch affiliation;
- innovative character/uniqueness of measures;
- consistency of measures – e.g. measures in the dimension of health management which include both behavioural and structural prevention, no contradictory measures within one dimension.

Such cases will be excluded from presentation in this chapter where most good policies have been reversed between two points of observation, or where no concrete examples of the measure could be given (i.e., the measure exists only on paper or is at conceptualisation phase). In some cases, good practice in one or several dimensions is counteracted with bad practice in others – most often that would be early exit incentives or non-consideration of job applicants above 49 years of age in the recruitment process. Already earlier reports (European Foundation 2006, Lindley and Duell 2006) have pointed out that phenomenon. Frerichs and Lindley (2009) argue that becoming a good practice company is an ongoing process rather than a fixed end point. Therefore, such two-sided cases are also documented here in the respective good practice dimensions.

Especially in small or medium-sized firms, policies fostering employability of older workers are introduced on informal and *ad hoc* basis without being explicitly codified in policy documents (Benedix *et al.* 2007). Such cases are documented here only insofar as the policy has a steady and reliable character.

Generally, it can be said that the demarcation between policy dimensions is difficult. Especially, there is some overlap between the dimensions 'employment exit and the transition to retirement', 'career development' and 'redeployment and retention' (e.g. the *DK02 DIY* case study) – in relation to career development for workers approaching retirement bordering on issues of volunteering – as well as between 'flexible working practices' and 'employment exit and the transition to retirement' (e.g. the *DK10 Post* and *DK01 IT* case studies – with relation to gradual exit models and lifetime working time accounts).

From the 83 case studies which recorded some good practice, the dimensions represented are shown in Table 3.1:

Table 3.1: List of 'good practice' case studies per dimension

No. of dimension	Dimension	Number of cases
1	Job recruitment	30
2	Awareness-raising, changing attitudes and diversity	20
3	Training, lifelong learning and knowledge transfer	59
4	Career development and mobility management	40
5	Remuneration	2
6	Flexible working practices	45
7	Health protection and promotion and workplace design	45
8	Redeployment and retention	25
9	Employment exit and the transition to retirement	37
10	Comprehensive approaches	15

Good practice in the field of training, lifelong learning and knowledge transfer occurs frequently throughout the eight countries participating in the ASPA project. The dimensions 'Flexible working practices' and 'Health protection and promotion and workplace design' are represented by good practice measures in half of the companies in the portfolio of completed case studies. In at least every third firm in the net sample, measures in the dimensions 'Career development and mobility management', 'Employment exit and the transition to retirement' and 'Job recruitment' can be found. Fewest good practice examples can be found in the field of remuneration.

3.1 Results by dimension

In the following, dimensions of good practice will be demarcated based on scholarly studies (Lindley and Duell 2006, Sporket 2009, Aleksandrowicz 2010, Bögel and Frerichs 2011, European Foundation 2006a, if not mentioned otherwise). Within each dimension, particularly remarkable good practice examples will be presented.

(1) Job recruitment

Good practice in this dimension includes non-discriminatory advertising, active measures tackling the sometimes application practice of older workers, non-consideration of age as a recruitment criterion (with exception of age-specific programmes like apprenticeships), assessing the aptitude of an applicant for a position solely on the basis of skills, recruitment of over-50-year-olds for jobs on equal terms with and of the same quality offered to younger workers, hiring of those aged 50 plus, affirmative action, explicitly targeting unemployed older applicants, using public support programmes (but without creating precarious jobs).

There were 30 firm cases in our sample which do not discriminate against older workers when filling vacancies.³ However, only some of them have explicit policies on age-neutral recruitment or affirmative action in that area. *NLII Research* has codified policies that no distinction will be made between older and younger applicants. New workers can be hired at

³ Although there might be some positions which are preferentially filled by younger workers or, on the contrary, with older workers, to the detriment of younger applicants.

any age, e.g. at the age of 55. Two firms in our sample *UK07 Call Centre* and the *DK02 DIY* explicitly target workers who might feel discouraged from applying. The UK-based call centre recruited people through advertisements on public transport and on the radio and encouraged word-of-mouth recommended. The firm applies anonymous applications with the help of an external non-profit organisation dedicated to help into work persons above 40, women after long childcare breaks and long-term unemployed. The applicants undergo a series of training sessions to update their qualifications. Another innovative recruitment measure at *UK07* are 'age ambassadors' – younger and older employees who attend recruitment fairs and try to 'woo' applicants by highlighting enjoyment they draw from working at the firm. *DK02 DIY* ran two successful recruitment campaigns in 2006 and 2007 with which it targeted long-term unemployed persons above 50 and older workers in general. During the first campaign, it used a database from the local employment office to select 16 older unemployed. As in the UK case, the selection was followed by on-the-job training, after which 11 persons were hired. In the campaign in 2007, an advertisement was developed which clearly stated that the company seeks experienced workers.

Next to those highly innovative measures, many firms in our sample have good practice policies focused on creating job opportunities for persons with placement obstacles. Especially Italian and Polish firms stand out in that respect. Most notable are *IT01 Care* (introducing flexible and reduced working time schedules to match the needs of older female nurses), *IT08 Social* and *PL07 Cooperative A* (supporting self-employment of mature unemployed workers and women after mastectomy, respectively), *IT05 Municipality* (re-integrating older unemployed on the labour market in a productive way, accompanied by on-the-job training) and *PL09 Kitchenware* (a large share of the currently 60% of women aged 50 years and older among staff have been hired in recent years).

(2) *Awareness raising, changing attitudes and diversity*

In this dimension, good policy includes awareness-raising of workers and managers towards ageing issues, the pursuit of diversity as the "*purposeful valuation and active utilisation of difference*" (Stuber 2002), spreading this idea to all workers and managers (from a top-down to a bottom-up approach), e.g. through diversity and inclusiveness training, age-awareness training including reflections on one's own ageing and spreading information on the change of capacities in the process of ageing, training of an ombudsperson, active combatting of stereotypes on grounds of age and other criteria, and conducting age structure analyses (Sporket 2009, Böhm 2007). In order to be highlighted in this section, policies in that field need not necessarily consist of tangible measures like health promotion offers, nor have tangible effects like having actually increased retirement age. Changes in the 'organisational atmosphere' which make themselves felt in inter-company communication or in a firm's culture relating to older workers can also be good practice.

Good practice examples in the field of awareness-raising, changing attitudes and diversity are not specific to a single branch of the economy. They can be found in the field of residential care (*DK04 Care*), financial services (*NL01 Insurance*), in small subcontractors to the automotive industry (*IT12 Machinery*) and in mid-sized construction companies as at *DK05 Construction*. The latter is a private construction company with 500 predominantly male workers, of whom 16% are 50 years of age or older. The largest occupational groups are sales representatives and blue-collar workers. Senior policy was implemented five years ago. A remarkable element of the strategy is the annual senior conference for workers above the age of 55. It lasts for two days and gives older workers the opportunity to discuss their future plans in professional and private life. Workers also receive advice on health behaviour, on internal opportunities of reductions of working hours and old-age pension regulations. The measure has had numerous positive side-effects – it contributed to cultural change,

encouraged older workers to admit physical restrictions associated with age and contributed to their retention by recognising their value for the company.

(3) *Training, lifelong learning and knowledge transfer*

Good practice in the dimensions named in the section heading includes giving equal access to further training to workers of all ages; taking care that equal access translates into equal outcomes by raising learning motivation of workers and convincing managers to invest in continuous training; affirmative action in order to include older workers, especially with low qualifications, in training, implementation of a qualification needs assessment and of a qualification plan for all workers, codification of those measures e.g. in a works council agreement; adapting training to the specific requirements of older workers, provision of learning opportunities throughout the whole career, designing of job tasks so as to allow for on-the-job learning and planning and organising knowledge transfer.

Based on those criteria, measures in the German manufacturer of home entertainment *DE04 Audio Equipment* is a public company which manufactures home entertainment equipment. It employs 940 workers, of whom 31% are aged 50 plus. In 2008, it received the AARP Best Employer Award for its age-management activities. In the firm, the know-how of non-tariff, high-level workers is documented in a competence matrix to facilitate qualification planning and know-how transfer. A roll-out of that procedure onto other groups of workers is planned. All workers have access to trainings, e.g. business administrator trainings or trainings in soft skills like intercultural competences. Qualification needs are part of regular appraisal interviews.

Other successful examples of know-how transfer are followed in small construction companies – the German *DE11 Steel Processing* and the Dutch *NL15 Construction*. The firms adopted low-threshold solutions based on older and younger workers forming a two-person team during building projects and in everyday commercial work. In the German firm, know-how transfer is supported organisationally, 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).

In terms of lifelong learning, the Swedish consulting company *SE04 IT* is a good example. It is a knowledge-intensive company and the employees need to be continuously updated in technological development and progress. An individual development plan is established for each employee and his/her supervisor. Training lasts 14 working days per year. There is a small bonus available for employees fulfilling their plan. The organisation has also developed a company-based tool for competence development, called the Learning Lab. Newly recruited staff can also access the specially designed Talent Program that helps build up competence and experience.

(4) *Career development and mobility management*

Good practice in this dimension entails the prevention of one-sided, overly specialised career tracks, of dequalification and health risks, creating opportunities for performing job tasks that match the qualifications and experience of older workers, implementation of horizontal career paths at the same hierarchy level and specialist career paths connected to a promotion to a higher-level job but without taking up managerial responsibility, increasing internal mobility and motivation by creating opportunities for multi-skilling and multi-tasking, carrying out appraisal interviews about career plans with workers of all ages, offering development prospects also for younger workers for whom management positions may not be vacant, and providing assistance to workers in the search for a new position.

Of cases in our sample, measures to upgrade competences of unskilled or low-skilled persons on the internal or external labour market merit particular attention. Such measures are followed in firms with a high share of blue-collar workers. *IT07 Shipyard*, an Italian private shipyard with 1,700 workers, of whom 15% are above 49 years old, provides opportunities for blue-collar workers to improve their qualifications and be promoted to supervisor or shop foreman positions. Those promotions appear to create a „win-win’ situation – internal promotions are useful for the firm as the new supervisors have know-how in several blue-collar positions. Another form of career development practised at *IT07 Shipyard* is the change from a blue-collar position to a technical-administrative one (planning office, storehouse management, ship plant engineering, quality control). The seniority needed to participate in internal promotion is only 3 years, which allows a life-course perspective rather than age-cohort perspective.

French waste disposal company *FR05 Waste* focuses on semi-skilled and unskilled workers by offering them literacy and driving training. After completion of training, refuse sorters and waste collectors can become refuse truck drivers, forklift truck operators and cab supervisors. Those measures, which are especially important for workers aged 45 years and older who have been employed for a long time in demanding jobs, are codified in the group-wide agreement on the employment of older workers.

(5) Remuneration

Adequate remuneration mirroring the actual performance of workers is important for preserving motivation of workers and keeping them in good psychological health. However, there are few scholarly analyses on that topic and also few good practice examples in firms (Bögel and Frerichs 2011). Typical approaches in firms concern the downgrading of older workers in financial terms or lowering the pay rises for them once their productivity-wage ratio is deteriorating when compared to lower-paid younger colleagues. The latter measure is practised at *DE12a manufacturer* of satellites and other high-technology and optical products, and planned for the future at *DE07 HVAC* (heating, ventilation and air-conditioning) service provider. Bonus and piecework wage systems and performance-related remuneration at team level are also regarded as conflicting with age management principles as they may lead to internal team rivalry, social exclusion of lower performers, prevent internal mobility and acquisition of new tasks, and may encourage workers to over-commit themselves.

A remuneration system which fosters employability in older age could either consist of polyvalent parts or of provision of both monetary and non-monetary benefits. The “polyvalent wage system” is composed of the basic wage, bonus wage, allowances for extreme working conditions, allowances for qualification and for versatility/multi-tasking ability and is calculated for every worker on individual basis. The provision of monetary and non-monetary benefits centres on the scholarly evidence that monetary incentives lose their function as incentive in older age (Grube and Hertel 2008). Firms can provide those benefits in a ‘cafeteria system’ consisting of additional health protection, additional old-age provision, support for elder carers, additional holidays, loans with favourable interest rates and support for child carers in the form of kindergartens, free meals for family members or granting contributions to the occupational pension provision system also during parental leave times. Such cafeteria systems are seldom implemented in German firms due to legal and collective bargaining restrictions. Another form of non-monetary benefits, found at the German firms *DE11 Steel Processing* and *DE12 High-tech* is the provision of flexible working time arrangements, health promotion measures and other measures tailored to wishes of individual workers with the explicit, verbalised goal to raise motivation and retain older workers for whom pay rises are no longer an effective incentive. At the Dutch municipality *NL12*,

employees of 62 years and older are supported in their fiscal opportunities (taxes and taxation load). Another interesting practice is rewarding workers for bringing in improvement proposals. At *PL06 Filters*, workers who brought in proposals which were chosen for implementation are rewarded. An example of implementation is the introduction of foot rests for persons who work at the assembly line in a seated position, in order to prevent musculo-skeletal disorders and improve comfort.

The organisation of social activities for workers and retirees and the provision of social facilities like kindergartens, hostels and resorts was frequent in Polish state-owned companies in the past (Morecka 2003). Monetary funds for social benefits were collected in the Social Fund at firm level. In our sample, such additional social benefits are much more confined but nevertheless remarkable, e.g. co-financing of higher education of workers at their own initiative at *PL02 Education*, additional health services at *PL05 Power* or free sports courses at *PL09 Kitchenware*. Pensioners from *PL08 Power* receive an annual additional cash benefit and assistance grants from the firm-level Social Fund.

(6) *Flexible working practices including reconciliation of work and family life/care and job rotation*

Good practice in this dimension consists of allowing workers to negotiate permanent or temporary reduction and re-allocation of working hours, also in order to bring about a better balance between child care or elder care and work, granting older workers extra leave in order to cater for their greater fatigue, implementation of a working time schedule in shift work which is more in line with the human biorhythm, preventing older workers from having too many variations in their working hours, provision of frequent (short) breaks during the whole day, especially after demanding tasks to allow a quicker regeneration, enabling job sharing and job rotation.

An outstanding example is the policy in *NL15 Construction*. It is a private, family-run construction company with 100 workers, of which 49% are above 44 years old. In 2007, it achieved the second place in Senior Power Award nominations. An innovative arrangement in the company is the so-called 'DUO-working' which is a form of job rotation that facilitates know-how transfer. It was implemented in order to retain older workers in good health until retirement. It functions in a way that younger employees take over physically heavy work from their more senior colleagues. The measure has been very successful in the company – workers participate in it in a spontaneous, natural manner and both sides appreciate the benefits from it.

Measures to reconcile work and private life and to reduce health-impairing effects of shift work can be found in the hospital sector characterised by prevalence of night shifts and working many shifts in a row. At *DK07 Hospital*, a publicly financed healthcare institution with 128 workers, special provisions for older workers are in place – they can opt out of shift work and on-call duties or work part-time (with continuous receipt of pension contributions in full amount). Since 2008, the policy has changed from an age-oriented policy to a life stage policy which takes into account the life stage the worker is in. Thus, workers have freedom to take care of an ill child or other relative and adjust their working time schedules accordingly. At the care home, *FR04 Care*, which was a hospital before, working time schedules have been considerably modified in order to ensure continuity of service – the daily working hours of nurses have been increased from 7.5 to 12 hours and those of kitchen staff to 10 hours. That move has generated mixed results in terms of age management objectives. On the one hand, the new working time schedules give employees additional free week-ends and their introduction was backed with approval expressed in employee surveys. On the other hand, longer working hours do not allow rest shortly after being exposed to stress which is one of

the key factors for preserving health and well-being at work (Oppolzer 2006). Thus, when introducing flexible working practices (be it work organisation or working time schedules), a balancing out of gains for the management in terms of higher quality of work and gains of employees in terms of better reconciling work and private life is necessary.

(7) Health protection and promotion and workplace design

Good practice in this dimension consists of behavioural and structural prevention measures pursued with the goal of preserving work ability and not (solely) the lowering of absenteeism rates, employee participation and education on health issues, regular assessments of health burdens and resources at the workplace, organisational health reports, training health supervisors and using the expertise of other internal or external health specialists, conducting regular health check-ups, albeit not connected to discriminatory practice, existence of a works council agreement on health management or workplace health promotion or a steering committee dealing with those issues.

In the light of those criteria, the solution for limited tenure in the dancer's profession on the example of *UK01 Ballet* deserves further attention. Its 187 workers (of which 52 are over 50) have permanent contracts, which is a rarity among dance companies in many countries. For dancers with health problems, the 'Jerwood Centre' was created which they can approach for advice and rehabilitation. It is a medical facility which helps to prevent injury and promote good health. Dancers are offered screening sessions several times a year, a 'flying' physiotherapist and masseur. The measure is highly effective, e.g., it was possible to reduce the number of injuries from 390 to 160 within three years.

(8) Redeployment and retention

Firms which are outstanding with regard to redeployment and retention of workers provide opportunities for integration of health-incapacitated workers at less demanding workplaces (which are however different from the so-called 'sheltered workplaces' bearing the risk of dequalification and demotivation), they have written guidelines on re-integration management, use redeployment not only for compensatory but also for preventive purposes (e.g. as part of the health promotion or career development policy), qualify workers in order to match the new workplaces, providing redeployment and retention opportunities also for workers whose skills need to be enhanced.

Redeployment and retention is a solution to jobs with health-related limits on the duration of activity, e.g. dancing (as shown in previous section), police work, construction, elder care, or waste management. An example of the latter is *FR05 Waste* – a public/private company in the branch waste collection, treatment and disposal employing 19,000 workers in France. Due to closing early exit options in France, health-impaired workers in waste collection are redeployed to sorting jobs, but an internal barrier is the unwillingness of workers to leave the workplaces they have got used to. The Polish bakery and retailer *PL03 Bakery* was externally recognised for creating a healthy and friendly working environment for disabled persons and older workers. Constant workplace monitoring is the basis for adjusting workplaces to the requirements and needs of these workers. The small Dutch paving firm *NL14 Construction* tries to find suitable places for workers who come back to work after recovery from a serious illness or injury. E.g., a 60-year-old foreman is reassigned to do acquisition for the company, a job for which his excellent communication skills and his professional experience make him suitable. A paver with physical impediments is trained to be a crane driver. That measure meets both the wish of workers to do meaningful work and the need of the firm to deploy its workforce productively.

(9) *Employment exit and the transition to retirement*

Good practice in this dimension is characterised by the fact that older workers themselves may decide on the timing and procedure of leaving the firm, the firm provides opportunities for staged/gradual exit in older age, there are opportunities for continuing work after the legal retirement age (either with a regular work contract or with a service contract without being inferior in times of wages or content compared to the work contract of non-retirees), creating new fields of work for the post-retirement phase adapted to the abilities, skills and needs of those workers, preparatory measures for retirement at corporate level, carrying out appraisal interviews with workers approaching retirement about their future career plans and enabling their implementation, whenever possible, providing opportunities for retirees to stay in contact with the firm, e.g. through alumni networks, providing opportunities for corporate volunteering, if desired after leaving.

Many firms in our sample, especially the German and Swedish ones, offer options for gradual exit from the firm. *DE05 Brewery* introduced in 2010 a ‚bridging pension‘ which enables employees with health limitations over 55 years to exit earlier. Three forms of working time reductions are possible with related remuneration variations within a ten-year period (70/30, 50/50, 60/40), allowing for a flexible timing of retirement and sufficient preparation for that phase. Other examples of firms which provide opportunities for gradual exit or progressive retirement are *SE03 Bank*, *SE06 Union* and *SE10 Signs*. Opportunities for post-retirement work are offered by *DE03 Administration* and *PL02 Education*. The Danish IT servicing and consulting company *DK01 IT*, among others, offers courses for workers approaching retirement in which they are prepared for the new phase of life and offered financial advice.

A special case is the way firms deal with the challenge of unfavourable economic circumstances which require them to shed personnel, or when there is a need to recruit more younger workers (e.g. in order to ensure know-how transfer). *SE01 Automobiles*, *NL03 Telecom*, *NL12 Municipality* and *PL01 Ships* deal with this challenge in a way as to update the tasks of the workers and ensure their internal and external mobility. E.g., when *SE01 Automobiles* was affected by the economic downturn in 2008-2009, 4,600 workers were dismissed at the Torslanda site. In order to improve the chances especially of older workers on the internal and external labour market, they were offered coaching and training for six months. After the end of the programme, 30 workers were to be rehired by the firm. Such examples have to be assessed with care in order to distinguish them from cases when shedding of older workers is a ‚one size fits-all‘ solution for personnel adjustment or health problems within the firm.

(10) *Comprehensive approaches*

The nature of comprehensive approaches requires that they do not consist of small-scale, isolated initiatives but have a holistic approach that recognises ageing and connected challenges as an issue. Holistic approaches should have a preventive, a curative and a compensatory focus, be directed at all age groups and not solely at older workers, be available to blue-collar and white-collar workers and managers, and, at best, should encompass measures in all or almost all dimensions of age management. A strategic direction should be visible and not solely *ad hoc* policies, and there should be no contradictory measures pursued.

Examples of comprehensive approaches can be found in the German firm sample (*DE01 Machinery*, *DE02 Transport*, *DE03 Administration*, *DE09 Metalworking*, *DE11 Steelprocessing*, *DE12 High-tech*), Dutch sample (*NL01 Insurance*, *NL08 Chemical*), U.K. sample (*UK02 Recruitment*, *UK03 Care*, *UK06 Telecom*, *UK07 Call Centre*, *UK10 Council*) and Polish sample (*PL01 Ships*, *PL05 Power*).

PL05 Power employs 1,114 persons in Poland, of whom 43% are 50 years of age or older. The comprehensive approach followed at the power company encompasses the following dimensions:

- age diversity: eliminating ageism, training older managers how to deal with young workforce,
- giving opportunities for continuous learning and upgrading one's educational level (from secondary school to MBA),
- know-how transfer from experienced workers onto young new recruits,
- maintaining contact with retirees by giving them access to medical services.

The case study does not fully meet the selection criteria for comprehensive approaches, as it includes contradictory practice – vacancies are preferentially given to young recruits. However, comprehensive age management policy with a strategic orientation is rare in the Polish context characterised by a tight labour market and case studies can only be as good as their national context or the “*societal effect*” (Maurice 1991) allows.

UK06 Telecom is a large telecommunications service provider. The firm operates in a highly competitive environment and intends to reduce its workforce further in order to cut down costs and as a result of technological improvements. Parallel to that, the percentage of older workers is increasing both due to retention of existing workers and due to non-discriminatory recruitment policy. The umbrella or heading under which this and other measures are implemented in the firm (flexible working, promotion of a healthy lifestyle, flexible retirement without an upper retirement age, continuous training, career life planning enabling career changes at any age) is the concept of diversity and inclusion.

3.2 Conclusions

Overall, the case studies offer a good selection of measures in almost every dimension.

- There are good measures in every country, although access to companies may be more difficult in some countries than in others and the assessment of the quality of good practice may differ.
- It is a positive sign that there are several examples of comprehensive age management strategies, notably in Germany, the U.K., the Netherlands and Poland.
- In the absence of integrative strategies, isolated measures may also serve the purpose of integrating workers of any age in employment.
- In the absence of codified policies, a firm may have *ad hoc* policies when the need for action emerges (e.g., re-integration after long-term illness).
- Measures in the field of training, lifelong learning and knowledge transfer are most often evident in our case studies.
- Measures in the dimension health promotion and protection and workplace design, as well as in the dimension of flexible working practices are often integrated into age management.
- The effects of some measures may be disputed. e.g., as regards flexible working practices, it is important to balance out gains for the management in terms of being able to respond better to peaks in employee demand and the gains for workers in terms of work-life balance.

- Some firms have implemented contradictory measures in age management, e.g. promoting the retention of older employees but continuing to discriminate against older candidates when recruiting.

4. Age Management in Comparison

The analysis of the 90 case studies has revealed that there are some common solutions for age management challenges favoured in certain branches of the economy. e.g., clustered solutions with regard to flexible working practices in the hospital and elder care can be discerned, or health promotion and workplace design measures in construction. In the following sections, similarities and differences with regard to the dimensions branch, private vs. public sector, size of enterprise and country will be presented in more detail, but still in an exemplary and non-exhaustive manner. Despite the presence of common guidelines of case selection for the eight participating countries, the criteria could not always be followed and actual access was often random (e.g., in the French case, access was inhibited as firms were very cautious due to pending retirement reforms). Moreover, the original case selection pattern developed by coordinators of the work package did not include criteria as to the mixture of sectors, with the exception of the recommendation to balance out cases from manufacturing, construction and services. Those factors inhibit a more systematic analysis of case studies by background criteria. Moreover, case studies have been conducted with a varying degree of depth both in the depiction of actual practice, in the assessment thereof and in the depiction of background factors. A detailed and systematic comparison would entail the risk of over-interpretation. In the following, similarities, differences and distinct patterns of age management policies by branch, sector, size and country will be presented.

4.1 Comparisons between branches

Table 4.1 shows that manufacturing firms are under-represented (26 out of 90 cases) but as the initial case-study guidelines did not include suggestions as to the numbers of manufacturing and services firms to be included, the sample can be regarded as a good mix of branches.

When cases are grouped in similar fashion as was done with regard to the ASPA employer survey (Deliverable 1), the following clusters emerge:

- 'industries and construction' (NACE C-F): 38 cases;
- 'services and trade' (G-N): 24 cases;
- 'public services' (O-S): 28 cases.

Results of the comparative analysis with regard to the variables 'rationale for the introduction of age management', 'development of the initiative across time' and 'dimensions of age management' can be presented using the example of the Netherlands, as that country sample includes the largest number of cases – five cases from the branches 'Industries and construction', four cases from 'Services and trade' and six cases from 'Public services'. However, the analysis revealed little systematic differences. If one keeps in mind the risk of over-interpretation by deriving quasi-quantitative information from a few cases, some differences nevertheless appear between the branch clusters. One difference which emerges between firms in the group 'Industries and Construction' versus the other two groups is the rationale for the introduction of measures. Manufacturing and construction firms are reacting to immediate problems – the physically demanding work at demanding hours (especially this aspect was often mentioned), the economic crisis and the shortage of qualified personnel. Services firms, in turn, introduced age management measures in anticipation of future challenges or as a reaction to societal changes – approaching shortage of qualified personnel, visible ageing of workforce, higher pressure experienced by older workers – or in order to meet an objective or idea – becoming an 'inspiring' employer, change from an educational institution to a 'knowledge institution'.

Table 4.1: Branch structure of firm case studies in the ASPA project

Broad section – NACE rev. 2	Number of cases
Manufacturing (C)	26
Electricity, Gas, Steam a. Air Conditioning Supply (D)	2
Water supply; sewerage, waste management and remediation activities (E)	1
Construction (F)	9
Wholesale and retail trade; repair of vehicles and motorcycles (G)	2
Transportation and storage (H)	5
Information and communication (J)	6
Financial and insurance activities (K)	5
Real Estate Activities (L)	3
Professional, Scientific and Technical Activities (M)	1
Administrative and support service activities (N)	2
Public Administration and Defence; Compulsory Social Security (O)	7
Education (P)	7
Human Health and Social Work Activities (Q)	11
Arts, Entertainment and Recreation (R)	1
Other Service Activities (S)	2
TOTAL	90

The analysis of case studies from all countries reveals rather similarities within singular branches than across broad groups of branches. Some examples:

- Similar challenges: educational institutions want to encourage adaptability to changes in personnel so that the organisations may complete the change to a knowledge-oriented company (this has been especially visible in the example of the Netherlands). The ten educational and research institutions in our sample put particular focus on practices in the dimension of training, lifelong training and knowledge transfer. Another challenge is securing teaching staff in times of a recruitment freeze and spending cuts in public schools (*IT10 Education, DK08 Training*) which is met by creating opportunities for continued work after retirement or for combining receiving a pension and part-time work. Age management approaches in those firms are rather individualistic and not focusing on a single age cohort – attempts at *DK08 Training* to adopt policies for older workers were thwarted by feelings of stigmatisation expressed by that group.
- Similar working conditions: construction companies have physically demanding working conditions but value their older workers for their skills and want to retain them in good health, even more in times of personnel shortages. Health care service organisations

(hospitals and care homes) have strenuous working time arrangements and suffer from personnel shortages and public funding cuts.⁴

- Similar economic framework: *Post and telecommunications*, represented in our sample by *DK10 Post*, *NL03 Telecom* and *UK06 Telecom*, are a competitive, liberalised market with cost reduction pressures. This results, on the one hand, in a trend to earlier leaving among older workers and, on the other hand, in the introduction of measures to preserve their health and reduce sickness levels.

4.2 Comparison between private and public organisations

The legal form of organisational ownership is another relevant distinguishing feature. Especially in post-transformation countries like Poland, the privatisation of formerly publicly owned firms generated personnel adjustment problems with impact on age management (Socha and Sztanderska 1991). The German public sector is characterised by a high average age of workers, a cap on hirings, reorganisation processes, secure work contracts, pressure for early retirement, less flexibility for early exit, and a narrowed leeway for the introduction of age management measures due to strict collective agreements (Marstedt and Müller 1998). The organisations in our sample have the following legal form or ownership character (Table 4.2).

Table 4.2: Legal form of firms in the ASPA sample

Legal form	Number of cases
Privately owned	60
Publicly owned	19
Mixed private/public ownership	4
Non-profit (publicly owned cooperatives or charities)	7
TOTAL	90

As a case in point, we will present the age management practice of largely publicly owned transportation companies. Such companies are represented by *DE02 Transport*), *IT04 Transport* and *NL10 Transport*. All are large, the size of the enterprise ranging between 800 and 4,300 workers. The municipalities are the largest shareholders of those companies, which has impact upon the degree of involvement of the works council and trade unions in employment matters (wage and employment security agreement at *DE02 Transport*, consultations between six trade unions at *IT04 Transport*, unionisation ratio of nearly 80% at *NL10 Transport*) and the usage of costly public early exit policies (in case of the Dutch and German firms). The workplaces are demanding and age-critical, and know-how is expected to be lost after the approaching wave of retirements. Even then, the average age of the workforce is bound to increase due to age-neutral recruitment policies. A common framing condition for public transportation companies is the liberalisation of the market enforced by European competition policy in the 1990s and the resulting increasing of competitive pressure through private suppliers. The three firms have in common that they deal with those age-related and

⁴ This is covered more fully in the section on comparisons by size of the firm.

competition-related challenges by intensifying investments in training and flexible working practices. *DE02 Transport* introduced a mixed work model composed of ticket control and driving, is testing team-based work concepts with a high degree of freedom and installed in 2005 the newly apprenticed vocation 'public transport professional'. *NL10 Transport* started a pilot programme with 'self-scheduling' to decrease stress related to fixed working time schedules. *IT04 Transport* gives older workers and workers with small children the opportunities to choose preferred shifts and routes.

In comparison, one would point to some policies in *SE11 Transport* which is a privately owned logistics firm with 34 workers. Similar characteristics to the above depicted public/private transportation companies are the high share of blue-collar workers and the job consisting largely of driving. Health problems result from shift work and constant working in a sitting position generates muscular problems and backache. In contrast to the high employment security of the above firms, *SE11 Transport* reacted to the financial crisis with personnel cuts following the LIFO (last in first out) principle. The unbalanced age structure of the workforce was addressed by preferentially recruiting young people, which also stands in sharp contrast to the policy of public/private transportation companies. Whereas in the latter, there was a trend towards curtailment of early exit options mirroring legislative changes, *SE11 Transport* induced workers to retire early by offering them partial compensation. Other solutions (job rotation, mentorship and prevention of musculo-skeletal disorders) seem to be typical of the transportation sector irrespective of the legal form.

Interesting sub-branches within the public sector are the police force and the army as examples of responsibilities of public administration. Those are represented in our sample by *NL06 Ministry* and *NL07 Police*. Those sub-branches are characterised by heavy duty work which is both psychologically and physically demanding (e.g., night shifts in the police corps, working abroad and experiencing a war in the Ministry of Defence). In both organisations, it is believed that health risks connected to those working conditions are age-related. At *NL07 Police*, it therefore proved a good solution to offer sports training separately for older and younger workers. Due to being part of the public service, the organisations are subject to public spending cuts and the paradoxical challenge of reducing workforce and, at the same time, supporting longer working lives (*NL07 Police*). Career trajectories are fixed and regulated which may reduce motivation. Organisations respond to that by creating opportunities for career development in order "to find a balance between the organisation's wishes to have good employees at its disposal to realize goals and employees' wishes to develop themselves in a way that motivates them" (quotation from report on *NL07 Police*). A 'Personal Development Plan' is drawn at *NL07* and horizontal job mobility for older executives is enabled, while The Ministry of Defence (*NL06*) seeks alternative positions (internally or externally) for military personnel above 55 years who will not be send to missions abroad anymore.

4.3 Comparisons between firms of different sizes

The size of a firm determines its ability to adopt a comprehensive age management strategy, to the detriment of small and mid-sized enterprises which have smaller monetary and personnel resources (Bellmann *et al.* 2003). On the other hand, smaller organisations are more autonomous in their personnel decisions. Being part of a smaller organisation by nature breeds more contacts with the manager and decreases the social distance between employer and employee, factors which facilitate collaboration. In our sample, large firms with more than 250 workers are overrepresented (Table 4.3).

Table 4.3: Firms in the ASPA sample by size

Size category	Number of cases
Small (up to 50 workers)	15
Mid-sized (51-250 workers)	24
Large (more than 250 workers)	51
TOTAL	90

Due to reasons explained in the introduction to this chapter, a systematic and detailed analysis of differences between firms of different sizes was not possible. It seemed therefore reasonable to focus on singular branches of the economy. For depiction, we chose the branch of Health Human Activities and Residential Care Activities, on the one side, and Construction, on the other hand, for reasons of the similar character of work. The health service is represented in our sample by the following seven organisations with age management initiatives currently in place (Table 4.4):

Two of the health care organisations are SMEs with a rather high degree of autonomy (*DK04 Care, FR06 Care*), two are large organisations (*IT01 Care, IT11 Hospital*) and three are medium-sized but their degree of freedom is limited by being dependent on the local authority concerned of which they are a part (*DK09 Care, DK07 Hospital, UK03 Care*). A common characteristic of those organisations is the good collaboration between management and workers, via their representatives. The medium-sized and large health care organisations experience tight financial pressure (hiring freeze, expected public funding cuts, necessity to shed labour) and increased amount of administrative work due to reorganisation processes. There is no common trend as to the life-phase versus age-cohort orientation of policies – the organisations had either first adopted an age-oriented approach and later shifted to life-stage policy (*DK07 Hospital*), apply an age-oriented (*DK09 Care, IT01 Care*) or life-phase perspective (*DK04 Care, IT11 Hospital*), have a policy for all with no special focus (*FR06 Care*), or have integrated those two perspectives (*UK03 Care*).

Differences become visible when comparing the autonomous *DK04 Care* to the medium-sized organisations which are subject to decisions made by the municipality. The first one has policies which are lived in everyday practice, rather than written down senior policy. The latter have top-down initiated policies which have crowded out local-level arrangements existing before (*DK07 Hospital, DK09 Care*). The reasons for the success of initiatives of *DK04 Care* are explained by its small size which allows direct contact between the manager and workers. The manager, herself a senior, is visible as a 'role model' and thus motivates other older workers to stay longer. The long-tenured workers know each other and the residents very well and have an 'ownership feeling' towards the care home. At *UK03 Care*, the framing conditions are different. The home is part of a local authority and experiences the negative sides of it (low degree of autonomy in personnel decisions, being affected by council-wide budget cuts) as well as the positive sides (more redeployment opportunities for health-impaired workers within the larger organisation, good occupational health facilities, profiting from the endeavour of the municipality to be a model case for 'best practice').

Table 4.4: List of 'good practice' hospitals and care homes in the ASPA sample

Alias	Name	Size	Duration	Covered dimensions	Legal form
<i>DK04 Care</i>	Sankt Lioba Hjemmet	29 (small)	short-term	awareness-raising, training, career development, flexible working practices, health promotion	public
<i>DK09 Care</i>	Vordingborg Municipal Home Care 'Fjordgaarden'	90 (medium, but subject to decisions made by municipality)	long-standing	awareness-raising, career development, health promotion, redeployment	public
<i>DK07 Hospital</i>	Ålborg Hospital	128 (medium, but subject to decisions made by municipality)	long-standing	flexible working practices, health promotion	public
<i>FR06 Care</i>	care home (anon.)	102 (medium)	short-term	job recruitment, training, career development, flexible working practices, health promotion	public
<i>IT01 Care</i>	L'incontro	350 (large)	long-standing	job recruitment, health promotion	non-profit
<i>IT11 Hospital</i>	ASL 4 Chiavarese	1,871 (large)	short-term	training, redeployment	public
<i>UK03 Care</i>	care home (anon.)	67 (medium, but part of a larger organisation)	long-standing	comprehensive approach	public

Those examples show that good practice in age management can be implemented in a sustainable way in organisations of any size, even though the barriers and opportunities are different.

Small- and mid-sized construction companies are an example of health management measures introduced in order to cope with problems typical of firms of that branch and size. They often encounter problems in recruiting qualified young personnel, are confronted with external mobility of older qualified personnel due to health problems and lack of career prospects, and face restrictions on the adaptation of age management measures because of low personnel capacity and low financial resources (cf. Georg *et al.* 2005, Bellmann *et al.* 2003). At *DE11 Steel-processing*, white-collar workplaces were equipped with ergonomic furniture (eye-friendly computers, height-adjustable desks, flexible office chairs). At blue-collar workplaces, the concrete floor was improved, standing aids, shock-absorbing mats and transport assistances were introduced. The company tries to get doubters on board by integrating them in work groups which suggest new promotion measures. Measurable effects so far have been lower contributions to the public accident insurance, reduction of sick leave and employee

turnover. Currently, the company is working on a balanced scorecard which will also measure 'soft' effects of health management measures like increased job satisfaction, motivation and improved working atmosphere. Dutch paving firm *NL14 Construction* employs 39 workers and recruits people beyond 60 years of age. Crucial concerns for the firm are keeping its employees in good health, keeping them content and retaining them. This is partly done by implanting in employees obedience to safety rules (always wearing safety and weather-adjusted clothing) and by investing in physically less demanding methods. Job rotation is used so as employees do not have to endure heavy lifting, pushing and pulling on a constant basis and thus preserve workability for a longer time.

At *NL15 Construction*, which has 50 workers, a model of job rotation called 'DUO working' is practised which facilitates job rotation. In that scheme, younger workers take on physically demanding, heavy work from their more senior colleagues. At a large Danish construction company *DK05 Construction*, all workers can make use of the opportunity of leaving the classical construction job with a piecework-pay arrangement and being redeployed to a job at the repair shop, which is conducted under less time pressure, with lower physical strain and with a work hour pay arrangement. That scheme has proved successful in the retention especially of older workers with health limitations.

4.4 Country differences

Country differences may arise to distinct national patterns which transcend differences with regard to size or branch affiliation. The explanation rests in the unique welfare – work arrangements, i.e. the combination of production regimes (like e.g. taylorism) with country-specific welfare state regimes (Naschold *et al.* 1994). Industrial relations, work organisation, qualification and career systems in a country follow “*institutional arrangements of their societal environments*” (Lane 1989). Socio-structural factors like demographic change, unemployment, ownership transformations, shifts of employment between branches, rationalization processes and the general economic trend also generate country differences. Another explanation for country differences in organisational practice could be cultural aspects, e.g. the opinions on a 'decent' age for retirement or working part-time and reliance on adequacy of pension income. The impact of such “*age-related employment culture*” on actual labour market integration of older workers has been confirmed (Jansen 2011), the “*early exit culture*” being represented by France and Poland and “*the late exit culture*” represented by the Netherlands, Germany, U.K., Sweden and Denmark.⁵

As could be seen, long-standing cases are frequent in Denmark, Germany, U.K. and Netherlands (cf. Table 2.1). With regard to other characteristics we may note the following in relation to the national case study portfolios:

- In the French, Danish, Italian, Dutch, U.K. and German sample, small firms are under-represented and large firms over-represented. Polish and Swedish portfolios offer a good selection of firm case studies with regard to size.
- Dutch, Swedish and Polish cases are heterogeneous with regard to branches. In the German sample, there are four construction firms, while in the Italian sample, service companies dominate. In the U.K. selection of firm case studies, manufacturing firms are represented only by one example.
- Firms from Denmark, the Netherlands and U.K. vary with regard to the legal form of the firm. In the German sample, there are only two public or public/private services firms. In the Italian sample, public and non-profit organisations dominate. There is only one

⁵ The impact of these cultural patterns on organisational behaviour are not considered here.

establishment which is not privately owned and profit-oriented in the Polish and Swedish sample.

When we look at the dimensions covered, it becomes apparent that there are policies which are more popular in some countries than in others. With regard to the dimension 'health promotion and protection and workplace design', Germany, U.K. and Denmark stand out. There are many innovative policies in that field at firm level in those countries. There are no isolated measures (e.g. return to work discussions after sick leave), but policies cover the whole range of health management from relational to structural prevention and health protection.

Policies in the field of 'employment exit and the transition to retirement' are often in place in U.K., Swedish and Polish companies. This is motivated by institutional regulations. In Sweden, progressive retirement was supported by legislation until 2000, and there has been an incentive to combine work and pension since the enactment of new pension system regulations in 2003 (Anxo and Ericson 2011). In Poland, there is no ban on employment of workers past retirement age, as is e.g. in German collective agreements (Aleksandrowicz 2010). Also in the representative employer survey conducted in 2009 within the ASPA project, Poland recorded the highest proportions of employers willing to retain workers until retirement age, beyond retirement age and when in retirement (Schippers *et al.* 2011). Relatively low regulation of UK labour markets contrasts with German publicly supported (and already discontinued) early retirement schemes (Frerichs 2009).

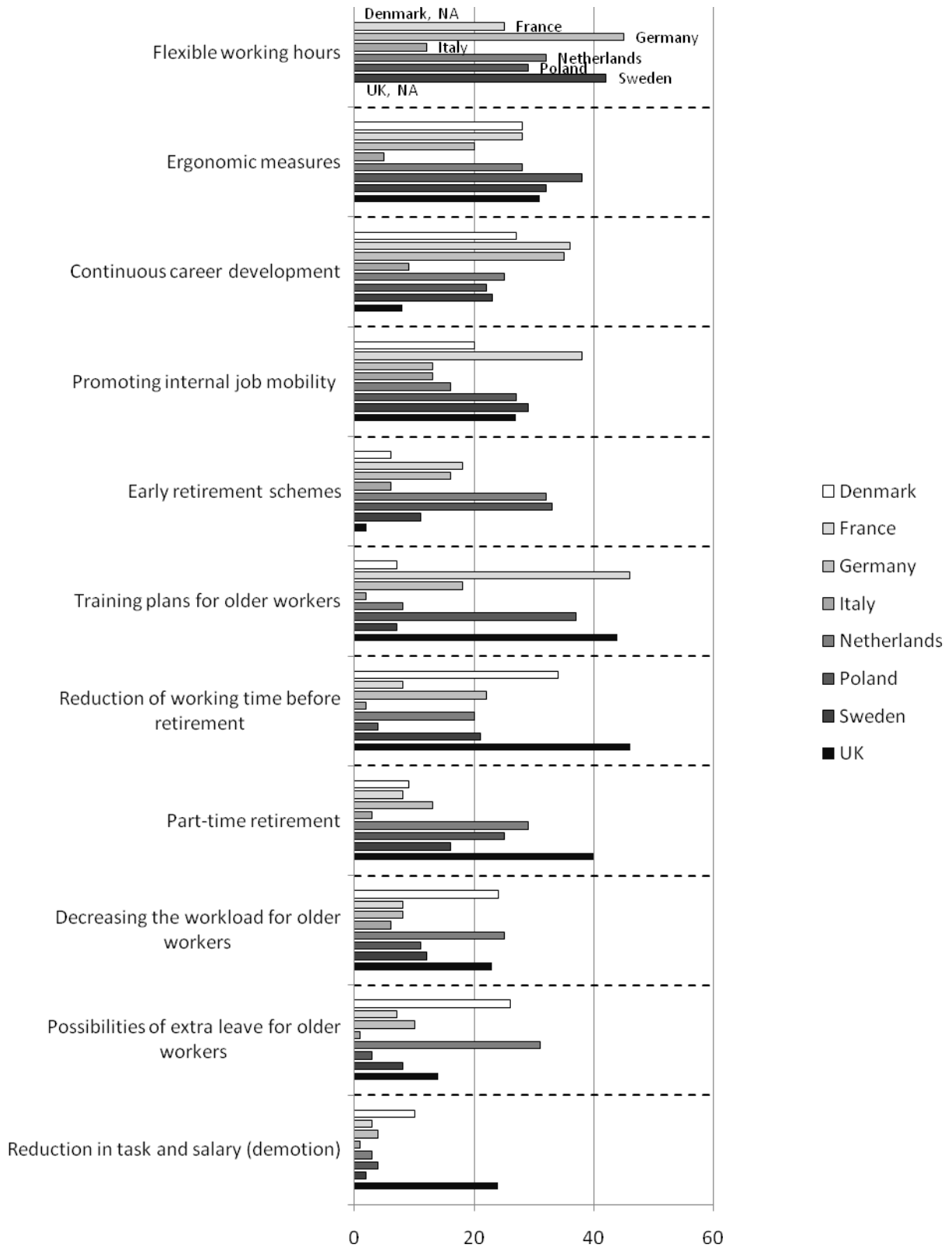
Another country cluster is visible with regard to the focus on 'training, lifelong learning and knowledge transfer'. In the qualitative case studies, many examples of good practice in that dimension can be found in almost every country. With regard to France, Poland and U.K., that finding is consistent with results of the quantitative employer survey (Figure 4.1).

In case studies, German firms often had good practices in the dimension 'flexible working practices' practices (incl. work organisation, e.g. the introduction of job rotation or enabling work-life balance), as did Swedish companies. From Figure 4.1, it can be seen that in Germany, a high percentage of employers support flexible working hours for older workers, while in Italy, it is rather low. That, again, is rooted in institutional opportunities and restrictions. In Germany, employers are obliged to allow part-time work under certain conditions introduced with the *Teilzeit- und Befristungsgesetz* which came into force in 2001, and with the spread of collective agreements regulating those issues. Part-time work in Italy is not wide-spread, not encouraged by employers and not seen as attractive by the workers themselves (Principi *et al.* 2010).

When comparing countries, another interesting distinguishing variable is the role of social partners, in relation to the organisational politics at firm level. In Denmark, Sweden, Germany, the Netherlands and France, practices in age management have either been initiated by trade unions at firm level or other forms of employee representation, or their implementation was contingent on high co-decision-making powers. Some examples:

- In Denmark and Sweden, interviewed experts reported there is strong union representation at firm level and cooperation is constructive and consensual. e.g., at *DK10 Post*, cooperation with trade unions allows management to legitimise policies in relation to employees and to prevent potential conflict and disagreement. A collective agreement was reached more than one decade ago that workers could reduce working hours at the age of 55 while retaining retirement benefits at previous level.

Figure 4.1: Which of the following measures regarding older workers are currently applied in your establishment?



Source: ASPA Employer Survey – Deliverable 1.2 ASPA Project

- In France, as in Germany and the Netherlands, sectoral agreements are in place, which have an impact on age management issues (Jolivet *et al.* 2011). In Germany, branch-level agreements are in place which have had an impact on the implementation of the part-time retirement scheme in the past and currently have an impact e.g. with regard to health promotion at firm level (Frerichs and Aleksandrowicz 2011). In the Netherlands, union power is also high. The largest federation of trade unions, FNV, negotiates collective agreement at branch level (e.g. railways) in order to improve the employability of older workers (Coenen 2011). In the Dutch case studies, micropolitics at firm level mirrors the strong position of employee representatives, composed of the dual structure of works councils and several trade unions (and, in the case of educational institutions, of 'participation councils' composed of employees and students). There are strong branch-level agreements in the Netherlands on age-friendly regulations spanning many dimensions, e.g. in the railway sector (Coenen 2011).

Italy, U.K. and Poland do not have strong employee representation at firm level. e.g., in Poland, plural unionism at firm level is the case which may dilute the power of employee representatives vs. the management. In the Polish case study sample, there were only three firms with one or more trade unions and three cooperatives which rely on decision-making by workers. The concern of trade unions in the realm of age management is mostly to secure adequate pension levels (Perek-Bialas 2011). Initiatives in age management in Italian, Polish and U.K. firms were introduced mostly in a top-down approach (with the exception of social cooperatives, which especially in the Italian context exert the function of integrating excluded and disadvantaged persons in the labour market). e.g., at *UK05 School*, teachers may belong to different trade unions, the role of which is invisible in everyday life. Whenever a concern arises, it is voiced directly towards the line manager and solved on an individual basis.

4.5 Conclusions

This chapter has briefly drawn some age management comparisons in relation to branch or sector, form of ownership, size, and country.

- Measures in the ten identified dimensions are neither typical of a given branch, or country.
- Nevertheless, clustered solutions per branch or some typical foci per country have emerged in the analysis – such as construction in the case of Germany, health and social services in the case of Italy.
- Rather than differences between branches, certain similarities within a branch could be found depending on the economic and institutional framework (e.g. the trend to outsource personnel in post and telecommunications firms sparked by cost reduction pressures in a liberalised market).
- With regard to the legal form of the organisation, privately-owned, profit-oriented firms formed two thirds of the cases. Private firms seem rather to externalise personnel adjustment problems while public organisations tend to seek to solve them internally.
- Firms with more than 250 workers are over-represented here. Good practice in age management has been implemented in firms of any size, although the challenges and facilitators are different. Smaller organisations are more autonomous in their decisions and can react more immediately to approaching problems.
- There are also national idiosyncracies, which are visible in dimensions of good practice followed by countries and in the role social partners at firm level play in the introduction of initiatives.

5. Pathways of Practice

The analysis of ‚good practice’ cases in Chapter 3 follows the normal approach to exploring practice which is reflective, aims to address one or more of the well-recognised problems of making the best of the capabilities of the older workforce, and alert to what seem to be innovative elements introduced by organizations. It does not agonise about which perspectives should be given most weight in the assessment of ‚good practice’; nor does it seek to assess how ‚representative’ of country or sector are the cases highlighted. Moreover, there is scope for further exploitation of the case studies beyond what can be encompassed in the present summary document.

This chapter concentrates on summarizing the development of the ‚pathways of practice approach’⁶ to analyzing employer experience as opposed to a primary focus on identifying good or best practices.

5.1 Identifying good practice is helpful ...but not enough

There is clearly a need for more good practice cases to enable organisations to know what others are doing in the field and learn from them. Chapter 3 reviews the cases produced under the ASPA project. It is sometimes difficult, however, to find cases that capture the context and dynamics which match the actual or anticipated situations within which an organisation is operating. There are then certain limitations to the insight extracted from particular good practice cases. These seem to relate to the following factors.

- Lack of attention to challenges from socio-economic environments – international/inter-sectoral comparisons.
- The need to recognise ‚conditional/contingent’ performance, i.e. that in relation to the extent of the circumstances being grappled with.
- ‚Best practice - good practice - good-enough practice’ – the focus on best/good practice ‚destinations’ can ignore potentially important lessons from failed and/or abandoned strategies.
- Potentially useful evidence on the evolution of a measure may be lost when focusing on finding current good practice examples. This ranges from initial adoption, experiment, through development, to embodiment in HR policy/practice or major reform or outright abandonment.
- Classification by dimension of HR policy and practice can miss the interaction between different areas of policy
- The interactions can be especially revealing when looking at experience over time, including transfer of an ‚age-management’ perspective from one area of practice to another.

Identifying *pathways of practice* means a shift in the focus of analysis of the case studies in using one or more of the age-management approaches over time. An attempt is made to use the body of case studies to produce a set of quite generic types of practice development which offer further insight for organisations and policy-makers to consider.

5.2 A methodological innovation – key steps

In practical terms, the project has followed the following sequence in analysing cases.

⁶ See Lindley (forthcoming) for an explanation of this approach and Baldauf, Galloway and Lindley (in preparation) for an implementation of it - both in relation to British experience.

1. Each case study is scrutinised for evidence of a *pathway* rather than just a description of a *destination* of practice. Those carrying out the case studies were asked particularly to seek out the narrative of change.
2. So a key issue is that in applying the metaphor of 'pathway' there needs to be a time dimension but not necessarily one of 'progression' to a current state of good practice.
3. Instead, evidence of an evolution of practice is sought that may involve retracing steps, following diversions, or just coming to a stop.
4. Explanations for the changes may relate to (e.g.):
 - policy/practice learning giving rise to intended changes in practice, or
 - having to negotiate new external conditions.
5. The case study narratives are examined for their significance and their *potential* scope for identifying a generic pathway.
6. As the case studies are examined, some of their narratives may fit into previously identified pathways, some may suggest modifications to existing pathways or the need to create new pathways, and others may offer little by way of evidence of change at all.
7. As new pathways are suggested, it is necessary to review previous cases to consider whether or not any of them might be allocated to a new pathway.
8. Inevitably, the number of pathways builds up as new cases are considered. A culling –consolidation (amalgamation) process must be developed so as to concentrate insights from the cases.

Annex 3 lists the pathways generated at the first stage of analysis with the allocation of case studies to whichever pathways seem particularly relevant at this stage. The order in which the pathways are listed has no significance. It merely reflects the order in which the country cases were scrutinised. The pathways of practice cases identified at this first stage are inevitably rather specific to the narratives of particular cases though there is an attempt to interpret them as generically as possible for their relevance to others.

Table 5.1 lists the resulting 24 provisional pathways derived from the scrutiny of the 83 ASPA case studies, of which it was possible to allocate 56 to one or more pathways at this first stage.

In identifying pathways, a number of technical issues arise which relate to finding significantly rich examples with generic content. For example:

- (a) How long does a trajectory have to be before it can be treated as a 'pathway'?
- (b) Can a sequence of unrelated destinations, spread out over time, amount to a pathway?

Note that just as the dimensions used in Chapter 3 overlap, so also do the pathways.

5.3 Pathways – some provisional illustrations

The identification of pathways from cases may ultimately lead to a completely generic form of description of the pathway as a way of leading to specific cases that will inevitably bear the hallmarks of their origins. The research has not yet reached that stage so the best way of illustrating the pathways at present is through using actual cases that fit a pathway particularly well. This is done below for several pathways by way of illustration in this summary report.

Table 5.1 Pathways of Practice – Initial Identification of Pathways

	Pathway
1.	The policy interplay between different organizational levels at different stages
2.	Mixed motives for introducing age management and the ways it can survive cyclical downturns in an adapted form
3.	Practice survival - knowledge transfer from older to younger employees in the midst of redundancies
4.	Age management at the intersections of organizational and individual life-cycles – maturing organizations and maturing employees
5.	Older worker concern about their future competence as the trigger for age management
6.	Customer need as the trigger for age management – tapping the unemployed and surviving the surplus-to-shortage transition
7.	<i>Age-independent</i> HR practice that still benefits older workers
8.	Striking the right balance – general life-stage policy and client needs as a two-part constraint on age-management initiatives
9.	Age management vying with organizational culture – „career development’ becomes a euphemism?
10.	Training and professional development – in-house provision
11.	Training and professional development – outsourcing for external support
12.	Training and professional development – accreditation
13.	Support via health programmes
14.	Organisational/structural change as context for opportunities for older works
15.	Moves towards flexible working and flexible retirement patterns

	Pathway
16.	Addressing workers' caution or doubts about training and other forms of support
17.	Development of personalised and individual approaches to meet the needs of mature people
18.	Decisions and policies outside the organisation which affect sustainability of the initiative
19.	Aspects of union presence
20.	Improving employability through careers guidance, training, lifelong learning
21.	Finding solutions to match older workers' capabilities to suitable jobs e.g. through redeployment, job rotation or internal mobility
22.	Exit/retirement preparation
23.	Work after retirement
24.	Concern for owner's/senior staff's own health/working conditions as a trigger for age management

In some instances, a case study may serve as an exemplar for more than one pathway. This might suggest that the pathways need further rationalisation (see section 5.4) but for the moment we simply report the current state of play.

These examples show certain elements of the pathways which different organisations have created. This is not a comprehensive review; it is rather a spectrum of examples which have some generic quality and which may serve as the core for further analysis.

The details of each case are not given here, but it should be noted that each context means that a particular pathway is shaped by a combination of several organisational needs and aims, not only those highlighted below.

These examples are not intended to be representative of the different countries or sectors. The cases referred to are primarily illustrative of ways in which the concept of pathways of practice might be pursued.

In some instances, more than one pathway is highlighted prior to the specific one selected from the example given below.

Pathway 02 Mixed motives for introducing age management and the ways it can survive cyclical downturns in an adapted form (or may not survive)

An organisation which can predict long-term growth is well placed to begin to introduce age management policies. This was the case with DK05 (below). However innovative practice is vulnerable during difficult economic times as with SE01 (below). The Pathway concept enables us to capture the organisation's readiness to experiment, explore and take risks. It does not imply that a defined route exists which is to be followed. Some organisations cope with economic and business pressure by adapting their approach to age management. In some cases, budgetary cuts have meant that a programme has had to be abandoned or severely reduced in recent more stringent business circumstances. The second example was innovative and successful for some years, but was not sustainable at this level in recent times.

DK05 Construction had no previous recruitment or retention problems, and expected long term growth, aiming to double its size by 2020. However the economic downturn in the construction sector meant that in 2009 employees were being dismissed. Age management here had first been provoked by at least three 'triggers'. Some workers had seen their older colleagues in a negative light, drawing attention to their weaker competence and a tendency to 'relax too much during the day'. Meanwhile, managers were realising that they had an ageing workforce in a generally ageing labour market, but to counter this, were also recognising the competence and knowledge embodied in their older employees.

The organisation brought together senior employees for a two-day conference, senior club activities, health checks and career development talks. Senior managers took part in the conference, demonstrating the importance they attached to their older employees. This company believes that its senior policy has removed age-specific taboos and allowed older employees to accept any limitation in their activity without any stigma. Well-being surveys record high employee satisfaction. Mixed age teams may have demonstrated the capacity of people of different ages to contribute different competences. *DK05* estimates that '10-20 % of seniors have decided to stay longer with the company'.

SE01 Automobile created senior production units in 1992. These were open to some employees who would otherwise have been redundant. Globally, the company employs more than 20,000 people, two-thirds of them in Sweden, but also in three other countries. By the mid 2000s about 370 worked in these senior production units, set up in close consultation

with the trade unions, and open to employees who met criteria on age/length or service. One aim was to offer more mature employees less physically demanding work: initially the units aimed for 75% of the regular production requirement but over time they came close to the average production level and became profitable. Many tasks undertaken had previously been outsourced. The benefits were that those involved had greater job security and this approach helped people to see the organisation as an attractive employer.

However the economic situation with increased competition meant that the organisation has had to focus on core activities and once again outsource some of this work. There are heavy physical demands on the employee in this sector, but there have also been big changes in workplace ergonomics, job rotation, education and competence development. By 2010, only about 50 employees were still working in these units.

Pathway 03 Practice survival – knowledge transfer from older to younger employees (sometimes in the midst of redundancies)

There are many formats for knowledge transfer. Most organisations are keen to retain the skills of experienced staff and find ways to pass these on to other employees for instance through 'shadowing' schemes, or mentoring, formal or informal, as in the case below.

In its use of the skills of older staff and in sharing these with younger recruits, this organisation's long-standing commitment to knowledge transfer and professional development means that it is not only an example of good practice, but also a model of how over time a pathway can be developed to ensure that the skills and knowledge of experienced employees can be shared with those who have recently been recruited.

PL05 is a power company, part of an international group. 43% of its 1,114 workers are aged 50 or more. Almost half the employees will be able to retire in the coming 7/8 years. For some time the organisation has had strategies for the employment and deployment of its staff. It has developed a broad set of age management practices, including cooperation with schools, approaches to career and skill development, a job rotation programme, age-diverse team development, awareness in the recruitment of new employees and mentoring and training programmes.

The company has a comprehensive and coherent stance which should support long-term stabilisation of employment and ensure a proper competence structure. Its more mature employees are considered a resource which is crucial to future success. Almost 70% have worked for the company for 20 years or more. Recognising that new/younger recruits take time to adapt, one focus has been on the process of the continuous transfer of knowledge and skills. Internally, the company identifies 'Experts' to take on the role of mentor. These people are mostly aged 50 or more. There is a high commitment with budgetary support to education, training and professional development in all forms, both in-house and external. This includes employees aged 50 and above.

This organisation is also innovative in that its Experts operate outside the company, speaking at schools, conferences, job fairs etc. The Experts are seen as ambassadors from among the more mature and experienced employees, for the company and for the energy sector as a whole.

Pathway 07 Age independent HR practice that still benefits older workers

Many case studies show that organisations with well grounded HR policies and practice do not distinguish older employees from others. When this works well, the general climate of the

organisation means that the individual worker who is older than most will have his or her needs recognised.

FR06 (Hospital) – see below – illustrates this as well as showing Pathway 15.

Pathway 15 Moves towards flexible working and flexible retirement patterns. (Or guarantee of regular shifts rather than variable working hours.)

Decisions made in organisations cannot always be predicted. The assumption and frequent practice is that the offer of flexible working patterns and variable retirement packages are attractive to workers in the later years of employment. This is often correct because that flexibility may allow for a gradual reduction of work and phasing down rather than continued work at full pressure followed by the ‘cliff edge’ of retirement. However the guarantee of a regular shift pattern, instead of variable working hours, has also been welcomed.

Both the above features are evident in the case *FR06 Hospital*, a public health geriatric hospital with an additional day care centre for people with Alzheimer’s. The workforce is over 80% female, with 35% aged 45-49 years and over 26% being 50 or more. In the next ten years, a quarter of the staff will be replaced. Most work full-time on a variety of shift rotas.

Recruitment includes people aged 50 and above and previous experience is valued. Retirement for nurses is now at age 57 (previously 55) and can be 60 for some. For nursing assistants it is 57 and for other qualified staff it is 62 years. There is low turnover among permanent staff: 40% have worked there for 26-31 years. Adapting the rota after consultation with staff takes account of employees’ needs as well as having to cover 24 hours every day. Attention is given to reducing physically demanding tasks and work accidents (with purchase of up to date equipment in recent years), and to burnout. However managers are reluctant to have a formal action plan to employ older people because of concerns about stigmatisation and discrimination. The focus is on protecting all staff, not any specific group.

Pathway16 Addressing workers’ caution or doubts about training and other forms of support

It is quite common for workers (of any age) and perhaps older employees especially to be reluctant to participate in formal training. Needs assessments could imply that an employee – of any age - is not wholly competent (which may be true). There can also be a resistance to training or professional development, based on previous unsatisfactory experience, or because this person has not for some time been involved in education or training. Sometimes Information Technology raises particular challenges for older workers. Such concerns did arise as an issue in some case studies. The ‘pathway’ here concerns how organisations address any such reluctance of this sort.

At *FR06 Hospital* - see above- training is strongly supported, including accredited courses. However some mid-career staff have been reluctant to enrol on courses. An in-house tutorial system has increased the confidence of those who acted as tutors.

At *DE04 Audio Equipment* the organisation faced particular challenges: increasing average age, work intensification because of previous workforce reductions, and the physical demands in production, particularly for older workers. The company participated in a regional and ESF funded programme which gave advice and support regarding future employment and HR policies. External consultants and trainers were involved. The analysis showed that employees aged 50 or more participated less in training and professional development than younger staff and that rising absenteeism could be expected because of the ageing workforce. As a result measures were introduced in management training, competence management, allocation of labour, development of new career paths and health promotion. A database was

compiled with competence profiles of staff and future competence requirements. This is being used to as information for appraisals, staff development and succession planning, initially for managers and specialists. Managers have done awareness training on issues related to workforce ageing. Other training courses relate to business strategy, languages, software or business administration.

UK05 School is another case where some employees (cleaning staff who mostly had long service at a private school) were at first reluctant to embark on a work-based accredited NVQ course. Several had not followed any formal education for a long time. This was countered by arranging the group sessions in the workplace rather than at a local college, choosing a facilitator who could handle their doubts and give reassurance, building training time into working hours to avoid any extra time commitment, and celebrating the outcome. Employees were also aware that in the local labour market such accreditation was increasingly being sought. This programme was supported by a national initiative which was cut following the change of UK government in 2010.

Pathway 17 Development of personalised and individual approaches to meet the needs of mature people

A personal approach can be very successful for some, but the evidence here suggests caution and the value of a more nuanced assessment.

UK07 Call centre had, with 900 staff, taken an active approach to age diversity and was recognised nationally for this. The company's experience over more targeted training was interesting. It previously piloted separate induction programmes for school leavers and people aged 45 or more because they were thought to have different learning styles and needs. However regular feedback showed that these groups preferred to be part of a mixed aged team, so this format was reinstated, along with a period of supported working to address any skills gaps. The pathway or trajectory for this organisation meant testing the policy and going through that process of learning so as to arrive at a policy and practice which suited the needs and preferences of its new employees.

Pathway 20 Improving employability through careers guidance, training, lifelong learning

This pathway relates closely to those where specific forms of training are adopted (Pathway 10, 11 and 12). We have charted different forms of training and professional development which organisations have adopted or encouraged. (Table 5.1) Alongside these, different forms of career guidance, developmental appraisal, performance review and so on provide formal opportunities for older employees to express their views.

Mid-career interviews (as in FR04 Aerospace) are one example. Cases from the Netherlands and the UK often exemplify the theme of training and development, whether this is to boost employability internally within the company or in seeking a job with another employer. Some examples remind us that the milestone of 55 or 60 or 65 does not apply in all fields.

NL02 Education found that early exit arrangements became increasingly infeasible and the organisation began to experiment, moving away from measures which involved some financial compensation for adjusting or ending their working lives, to developing a life course orientated HR approach focusing on, for example, training, employability and flexible working. Calls to submit ideas to improve the employability of older employees through individualised plans were followed through but the lack of positive cost-benefit outcomes in the short term led to a rethink. A reorganisation and centralised HR team and new specialised units within it enabled the organisation to take a more strategic approach to developing the employability of staff through specific training/lifelong learning, performance reviews,

flexible working and giving support to employees at risk of losing their jobs. This centred on internal mobility through prioritising vacancies for those whose jobs were under threat and offering career advice. The pathway here shows the organisation taking stock and adapting its practice in the light of employees' opinions.

NL03 Telecommunications responded to difficult economic conditions and the need to reduce the workforce by adopting early retirement strategies. However, realising that this was expensive, as the government tightened eligibility criteria, and also unproductive, because valuable expertise was lost, the focus moved to improving external, and, as far as possible, internal mobility across age groups, and later to improving employability and employment conditions in general in order to be able to face the strong competition for qualified staff which the company expects in the future.

Some employees face more specific hurdles at an earlier stage. Military personnel at *NL06 Ministry* face physical and other demands and this organisation, as a result of national policy, underwent restructuring between 2004 and 2008 because of financial cuts and reduced interest in military careers. Now career guidance at an earlier stage in their working lives is supported by attention to knowledge transfer, training, redeployment and external mobility.

Similarly *UK01 Ballet* must address career development earlier than in most sectors, because classical dancers generally move away from a career at international standards of performance in their mid 30s. This case shows how the employer addressed this through high level, accredited professional development to prepare dancers for a range of non-performance posts. (This company also provided excellent facilities and professional support to help prevent injury, or to enable recovery from mishaps.)

Pathway 21 Finding solutions to match older workers' capabilities to suitable jobs e.g. through redeployment, job rotation or internal mobility

This pathway connects with Pathway 20 but centres more on job rotation, with some changes in training aimed at job rotation in the future. The balanced programme reported below does not stigmatise older workers but is more inclusive. It also shows how the experience of an early experiment which may not prove sustainable will nevertheless inform a later programme which can take account of the lessons learned before. The dynamics of pathways mean that there is always a choice of routes, not a fixed template.

DE02 Transport first introduced job rotation or mixed work for bus drivers in the late 1990s. This was phased out because it was not viable because of rationalisation of suitable areas, training need requirements and lack of job partners. However it came back as part of a high profile project focusing on the ageing workforce and was reintroduced in 2010 in a different format as a pilot. This has the potential to be economically viable and to be extended to other areas which best meet the interests of older employees.

The current model, aimed at older workers, still had to encompass the wider workforce to increase interest. As part of this model employees had further training to take up driving and ticket control tasks in rotation. Newly recruited bus drivers participating in the scheme were employed on a higher pay rate than an ordinary ticket controller (at a time when recruitment for ticket controllers in the company's subsidiary had stopped). A new apprenticeship scheme (Public transport professional) introduced in 2005 offers job rotation from the outset as people are trained to work in related areas such as customer services and marketing.

5.4 Concluding Reflections

The method of analysis of case studies described in this chapter has been articulated not from the point of view of identifying a specific dimension of age-management and „good practice’ exponents of it but so as to identify types of pathway of practice. The focus has been on the dynamics of practice:

- the changing motives behind the use of an age-management measure or combination of measures
- the way different dimensions and combinations of dimensions may be deployed at different times
- how the impetus for policy and practice may switch between different levels of the organization with implications for the balance between measures adopted
- the influence of changes in labour market conditions
- the internal or external triggers for age management that come from workers or customers, respectively

The aim has been to gain further understanding from paying attention to journeys not simply destinations.

The methodology being developed involves a culling or consolidation of pathways in the light of experience of using them. The following chapter does that to some extent in the context of looking, albeit briefly, at the evidence on „drivers’ of initiatives and change in age management.

6. Drivers of Age Management

6.1 Drivers, dimensions and pathways

Chapter 3 already alludes in some cases to the drivers which stimulate good practice in different dimensions of age management. This chapter adopts a more dynamic approach to the discussion of drivers.

Drivers for the change of any management practice can come from various directions. The common external macro-drivers of changes in demography, technology and international trade can operate in sometimes direct and dramatic form on business environments. They can also be filtered considerably by regional (as in EU), national, sectoral and organizational conditions. A further macro-driver relates to regulation which is also clearly external to the particular organisation and may be highly differentiated according to country and sector, even where its source is ostensibly common (see, for example, the variations in implementation and compliance among EU Member States regarding social legislation).

At the same time there are other drivers which are at root highly differentiated according to country, sector, etc. Chapter 4 provided some broad comparative analysis of the case studies. Once the pathways of practice methodology has developed further it is conceivable that a form of comparative analysis will also be possible; this would, for example, seek to explain why certain age-management pathways are found especially in certain countries or sectors.

Some of the pathways of practice identified from the case study data are closely associated with certain drivers for change whether provoked by external business conditions or not.

Whilst it seems likely that many organizations are inevitably going to be affected by some underlying development, such as a general labour supply constraint produced by an ageing work force or high unemployment from a major recession, there is still room for considerable variation in the interaction between the general driver and different components of age-management policy and practice. There is also much variation in timing: particular triggers capable of affecting timing and seemingly quite prominent determinants of whether or not the initiative gets going can obscure the primary importance of an underlying factor.

6.2 Further development of the pathway classification

The idea is that pathways of practice should add new insights to those that can be derived from good practice studies organized according to dimensions of practice and seen largely as destinations of accomplished good practice. The pathways and the structure of the classification presented in Chapter 5 will be further developed before they together can amount to a practical knowledge transfer ‘tool’ by which organisations and policy-makers may reflect more effectively on the accumulating experience with age-management initiatives.

In the present context, where the interest is in the drivers of changes which lead to the observation of a pathway, we might re-order and, in some cases, cut or amalgamate certain pathways. This would simplify the analysis but even then, a given pathway will not necessarily show a straightforward playing out of cause (driver) and effect (pathway). More than one driver may be involved, and more than one dimension of age-management initiative may feature in the organisation’s trajectories. No modifications to the pathways are made at this stage. Instead, the remainder of this chapter uses the existing designation of pathways to provide a narrative relating to the drivers of age management.

In order to do that, Table 6.1 sets out schematically a way of looking in a simplified form at the relationships between drivers, pathways and HR dimensions. The dimensions are expressed slightly differently from the list of dimensions used in Chapter 3 – the latter are shown via the figures in square brackets that match the ‚type of measure‘ used in the interview guidelines coded in the case study summary tables.

Essentially, the sequence of analysis in this chapter is to (1) identify a driver, (2) follow its impact in *starting* one of the observed pathways of practice or *intervening* part-way to influence the course followed and (3) relate it to a dimension or area of organisational policy/practice (in this chapter, the areas mainly selected relate to HR).

6.3 Drivers for age-management initiatives and their pathway outcomes

This section illustrates the ways some of the more important drivers that stimulate age-management initiatives, or that intervene during a period of change act on and interact with other factors in the external environment or arising within the organization.

(a) Primarily organisation internal drivers that may link in with external drivers

Age-management strategies have been driven by particular internal human resources challenges the organization needed to address, e.g. high absence rates, as case (1) below illustrates.

(1) Drivers: High absence rates

P14: Organisational / structural change as context for opportunities for older workers

NL04 Construction: High absence rates gave rise to the eventually award winning development of a pro-active health and safety policy, which was refined/reinforced over the years. As health and safety alone is often insufficient to keep people in a physically demanding job until the age of 65, where necessary staff will be supported in their transition to another job (e.g. through outplacement) at a time when they still have a good chance to embark on another career.

Recruitment and retention issues are another example that led to the adoption of age management strategies. These issues may be caused by lack of development opportunities or more specifically opportunities to take on less physically demanding tasks (2), older workers' anxieties about their competences prompting them to consider exit strategies (3) or failure to attract enough younger people (4), and concern to deal with mid-career scenarios affecting high performance occupations (5), as the examples below illustrate.

(2) Drivers: Retention and recruitment problems and demographic changes

P20: Improving employability through careers guidance, training, lifelong learning, P21: Fitting older workers' capabilities to jobs/redeployment unit/internal mobility

DE10 HVAC: Retention and recruitment problems began to affect the business when the owner of a micro company took part in an industry-led training association project on demographic changes. Formal training that aligned with business needs led to two less physically demanding job roles (e.g. after sales-manager), accommodating a person with health problems and enabling another worker to stay longer in this line of business, while at the same time offering much sought after development opportunities. Moreover, reducing physical loads (e.g. lighter building material) and better use of auxiliary devices

Table 6.1 Drivers, Pathways and Dimensions – A simplified schema

Driver	Pathway example given	<i>Responding to the drivers of change often leads organizations to adopt pathways that involve initiatives in several areas. Those below are principal or initial dimensions of policy/practice involved</i>
Macro-drivers		
Demography - ageing workforce	See specific drivers	
Technology -	P04: Age management at the intersections of organizational and individual life-cycles – maturing organizations and maturing employees	
International trade	See specific drivers	
Regulation	See specific drivers	
Specific drivers		
		Basic employment relationship
Social responsibility vs. business case	P06 Customer need	(a) awareness raising, changing attitudes and promoting diversity [2]
EU Social regulation	Pathway diversion in P05: Older workers’ concern about their future competence as the trigger for age management	
	P15 Moves towards flexible working and flexible retirement patterns	(b) flexible working [6]
Recruitment and retention issues (including lack of succession planning)		(c) entering, leaving and retiring [1, 9]
Blocking of exit routes (early retirement) requires new strategies		
		Organisational structure and occupational identities
Realignment of business (up-skilling becomes crucial)	P21 Fitting older workers’ capabilities to jobs/redeployment unit/internal mobility	(d) organizational design
		(e) job rotation and re-deployment (internal mobility) [8]
De-motivation of older workers and early exit	P05 Older workers’ concern about their future competences	(f) training and professional development (forms of working and learning) [3]

Driver	Pathway example given	<i>Responding to the drivers of change often leads organizations to adopt pathways that involve initiatives in several areas. Those below are principal or initial dimensions of policy/practice involved</i>
	P03 Practice survival - knowledge transfer from older to younger employees in the midst of redundancies	
		Health and wellbeing
High sickness absence rates	P14 Organisational/structural change as context for opportunities for older works	(g) health and safety at work, workplace design and accessibility [7]
Work intensification Physical demands of the job		
Business owner concern for own health and working conditions	P21 Fitting older workers' capabilities to jobs/redeployment unit/internal mobility	
Concern about working-age health and wellbeing	P24 Concern for owner's/senior staff's own health/working conditions as a trigger for age management	(h) health promotion, health insurance [7]
		(i) personal counseling [4]
		Information and advice
Plan for re-deployment and eventual retirement		(j) information, advice and guidance (careers, re-deployment, re-training, general well-being, preparation for retirement) [4]
		'Remuneration'
		(k) additional age/service-related holiday entitlement [6]
Bring performance/productivity into line with earnings		(l) remuneration and pension arrangements [5,9]
Improve pension scheme viability and fairness schemes	Restrict early retirement to actuarially-fair provisions – reform other scheme parameters relating to contributions and benefits.	
Ageing workforce and blocked exit routes	P23 Work after retirement	Comprehensive/multiple measures approach

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improved the working conditions for the wider workforce. These measures, together with the regular training in technical and business skills of all staff and leadership training, led to a number of positive results, including better retention of staff, more satisfaction and engagement among staff and reducing the owner's workload by way of delegation.

(3) Driver: Older worker anxiety about their capabilities to keep knowledge and skills updated

P05: Older workers' concern about their future competence as the trigger for age management

DK01 IT came to realize that there was „a taboo about ageing among the employees'. Older staff were concerned that their knowledge was outdated, and were becoming insecure, with lack of confidence in having a future career with the organization. This was precipitating earlier retirement at the very stage when the company had the means to stabilize the core capabilities available to it, namely an older workforce.

The response of management was to adopt a mixed strategy of supporting the professional updating of staff and hence boosting their competence and confidence, making it financially rewarding to opt for shorter working hours rather than outright retirement, yet at the same time helping the older staff to prepare better for retirement when this did actually come. Provision for a 20 per cent *voluntary* reduction in working hours, along with a corresponding reduction in salary, lowered the pressure on staff at work but employer pension contributions were unaffected. This meant that both pre- and post-retirement circumstances benefited from the perspective of the individual. No doubt hourly labour costs to the employer rose through both the additional training and the rise in pension contributions relative to wages but there were gains in labour quality (productivity) among older workers and reduced recruitment costs. Further benefits from this stretching out of the work-retirement nexus were obtained by offering older workers the opportunity to modify their job content in favour of less physically or mentally demanding tasks or opt for re-deployment, in the light of an annual personal development review.

(4) Driver: Recruitment needs and meeting the preferences of older workers

P17: Personalised and individual approaches (with respect to more predictable work schedule and tasks, attention to health, and career progression)

IT04 Transport has addressed age management in two initiatives for about 30 years. One concerns knowledge transfer; the other addresses working timetables and routes. Employees aged over 50 (or with 25 years' service) are offered a „fixed shift' and those aged 55 or more (or with 30 years' service) are offered a „fixed route' option. The organisation had difficulty recruiting younger people, partly because of the nature of the work but also because getting the necessary driving licence is costly. This situation has persisted in recent years so the age profile remains high with a maximum retirement age of 60. Improving the working conditions of more mature employees (93% being men), encouraged them to continue working and to share their experience with others. (Health checks were also introduced and the company offers career progression opportunities to long-standing employees.) Subsequently, the choice of a „fixed turn' was extended to people with pre-school children, and more recently to drivers with older dependent relatives, recognising life-cycle demands. Having established these initiatives, they are now seen as an „acquired right' by employees. The pathway for this company has enabled it to fulfil the requests of

workers aged 50 or more, but it could be that in the future it may face difficulties in finding enough workers to cover the „remaining shifts’.

(5) Driver: Imperative to extend period of maintaining high performance standards and then plan for mid-working life (i.e. early) career change/re-deployment

P20: Improving employability through careers guidance, training, lifelong learning

UK01 Ballet featured in Chapter 4 as an example of a pathway where the employer and employee are obliged to think about alternative careers much earlier than is normal because of the demands of performing at international level. A tailor-made MA course enabled this. This company gives its dancers high job security and provides exemplary physical support designed to prevent injuries in a purpose –built centre. The driver is about keeping employees safely in work. In the present economic situation, it is relevant that the health centre has a modest income from other sources (elite athletes who need specialist facilities and support).

(6) Driver: Ageing supply of labour and need to retain older workers but with social responsibility overtones.

P(provisional): The company as an ‘extended family’ sharing company values and retaining skills. Commitment to broader health and welfare of employees, retirees, family members, and local community

IT06 Textile machines previously family owned, has existed almost 100 years. Only 10% of workers are female and 36% are aged between 50 and 70. In the 1960s the company culture led to various initiatives supporting employees and the local community. Most policies and practices are open to all employees but in 1964 when still in family ownership an „Older Workers’ Group’ was created. The aim was to share the expertise of these people within the company and to encourage their attachment to company values. Members had to have 25 years’ service or be retired employees. Many social events, holiday opportunities and information sources were offered. A separate „Relief Fund’ created in 1963 with agreement from the trade unions focused on employees’ health, with benefits continuing after retirement. These included the children of the employee, covering medical, dental, optician examinations as well as some drugs, and general examinations for workers’ families.

These well established initiatives have been sustained despite changes in ownership. Now workers can join the „Older Workers’ Group after only 15 years. Leisure activities have reduced as other social options outside the company have developed, but valuable medical and related benefits continue, nowadays for children up to the age of 18. This pathway, even with its adaptations, addressed the employee’s whole working life. Today more flexible contracts are used and younger people are often hired on temporary contracts. However it was reported that the feeling of belonging to a family makes workers feel that it is a privilege to work for this organisation.

Sometimes, organizations want to pre-empt recruitment and retention issues by seeking to become an employer of choice, adopting „age management’ strategies along the way (e.g. *UK10 Council*).

In other cases, the owner or senior staff in SMEs may be proactive, because they are concerned about their own working conditions (see example 7 below) or want to create conditions for them to enjoy the last three decades before retirement.

(7) Drivers: Concern for own health, extending working lines in a physically demanding job

P21: Fitting older workers' capabilities to jobs/redeployment unit/internal mobility

DE06 Roofing: Concerned with his own working conditions (health issues, getting older, need for deputising) and driven by a vision that it is possible to reach normal retirement in this line of work, the owner of a small company embarked on a collaboration with an external consultant focusing on demographic changes to develop a strategy. Essential to this was a reminder and encouragement for staff to use assistive devices to handle heavy loads and an informal, needs-based job rotation model that allows for a change between outdoor, on-site work and office-based work for those in their 40s the owner wants to retain.

In other instances the realignment of a business or changes in the business environment have driven up training needs, presenting a chance for employees, including older workers, to take advantage of the organization's support for gaining accredited qualifications, which may improve their internal and / or external employability in the medium to longer term. Further details can be found in examples (8) and (9) below.

(8) Driver: Organisational growth; internal reshaping to reinforce training and professional development; commitment to accredited training in nationally regulated market for services

P12: Training and professional development - accreditation

UK 04 Training is a charity and non-profit-making, but it has strong reserves and has in the past five years undergone major restructuring, changes in senior management and organisational rethinking. Its workforce is 31% aged 50 or above, 38% aged 30-50 and 31% aged below 30. There is no explicit age management policy: opportunities and support are open to staff regardless of age, to address the individual's particular role and situation: it has been working to make training more personalised. Recent challenges have been to meet the pressure of tighter external national regulation in a very competitive market. To meet some of these challenges, the organisation brought in two training programmes. One was Customer Service training at NVQ Level 3. The other was Management Training on the CMI Diploma Level 5. The organisation tracked some of the effects of these programmes for its trustees and identified better relationships, fewer grievance complaints, lower absence for sickness, and lower staff turnover. However the HR manager was cautious about attributing any of these outcomes to any single initiative because cause and effect can be more subtle and complex. This reminds us that the effects of the pathways taken are not always simple.

(9) Driver: Realignment of business

P21 Fitting older workers' capabilities to jobs/redeployment unit/internal mobility

NL05 Education: In its drive to make the transition from an educational institute to a knowledge centre that conducts applied research, the organization supports its employees through personal development plans and associated small funds to enable them to gain relevant qualifications (e.g. a Masters degree for teachers) and skills that are required to match the organization's ambition. Having set up a new centralized HR department in 2001, new HR policies were introduced (e.g. annual review consisting of three sessions) and other aspects of HRM were followed through more systematically, such as recruitment and selection, training and development or health, safety and ergonomics. Over the next three years particular emphasis will be paid to improving the cohesiveness of HR policies.

(b) Primarily external drivers (e.g. cyclical or sectoral changes, regulations)

In some instances, organizations wanted to prepare themselves for demographic changes by analyzing the age profile of their workforce and looking at strategies for how older workers can work productively for longer at a time when difficulties recruiting newly qualified people are already being felt, as example (10) shows.

(10) Driver: Age structure analysis and demographic changes

P15: Moves towards flexible working and flexible retirement patterns

DE12 High-tech: When the medium-sized high tech company embarked on a regional, industry-led project in 2005 its key aim was to analyze its age structure and any associated risks given the ageing of society as a precautionary measure. As part of the project the company set up a workshop on leadership training in times of demographic change and invited mainly older employees (50 plus) to a discussion about what could be done for the workplace to remain attractive in ten years time and what competences are and will be required. As a result, training courses for managers were set up, knowledge transfer arrangements for managers retiring in a couple of years time were introduced as were specialist non-managerial career development opportunities and more flexible working opportunities, and a new HR development post was created. These measures form part of an overall HR strategy which also facilitates the recruitment and retention of older workers through formal and informal arrangements and specific measures designed to keep motivation and productivity of the workforce at a high level. Due to the success in recruiting younger staff the age profile (which is still analysed periodically) is more balanced than would otherwise have been the case, with currently about a third of the workforce being 50 plus.

Cyclical changes can also prompt changes in the age management strategy, with example (11) focusing on a company that needed to find strategies to retain older people with valuable skills when it suddenly began to expand following a period of stagnation and example (13) depicting a company that managed to retain its age management strategy, in particular its knowledge transfer programme, during a period of substantial redundancies at it realized its importance for the success of the company.

(11) Driver: Business upturn and need to prevent skill loss and promote knowledge transfer

Variant of P03 Practice survival - knowledge transfer from older to younger employees (but not in the midst of redundancies) plus P23 Working after retirement

FR01 Nuclear employs 68,000 people in France. After a long slack period, 2003 was a turning point for the organisation. Before this, redundancy arrangements and age-related measures already in place assumed a retirement age of 55. A strong upturn in business in 2003 triggered the need to prevent skills losses, ensure that they were passed on and continue contact with staff who had actually retired.

The organisation's older worker policy used especially interviews in the years prior to retirement. These were career interviews at age 50-55 to set contacts and boost later working life. An experience interview 1.5-3 years before retirement (mainly for executives) focused on the transfer of expertise. A post-retirement partnership was set up for engineers and executives as independent service providers. This aimed to retain expertise and avoid the competition using it, and this scheme has worked well.

Development of age management in this very large organisation has taken place against the national raising of the retirement age from normally 55 to normally 65 and then the

67. The pathways at *FR01* show a mixture of positive and negative drivers and positive and negative results.

(12) Driver: Labour shortages and age structure

P02: Mixed motives for introducing age management and the ways it can survive cyclical downturns in an adapted form

DK03 Cement has also apparently an active age-management position, although it appears to have done so without either a background of concern about negative attitudes towards older workers or the prospect of a long-term growth strategy that might be undermined by poor retention and deployment of the skills and experience possessed by senior employees. It presents evidence of how an age-positive culture can be sustained in spite of periods of major downturn in business activity. *DK03* went in to the recession of 2009 already having been recognized two years earlier by the Ministry of Employment as being amongst the best companies in Denmark regarding its treatment of senior employees. Its reputation was built around practices relating to flexible working, job rotation, training and health, all of which were aimed at encouraging employees to postpone their retirement. The immediate case for doing this followed from the overall labour shortage situation at the time and the company's recognition that about one third of their work force was likely to retire over the next decade; this came on the back of an organizational culture that was already sensitized to valuing the contributions of older employees.

(13) Driver: The need to sustain inter-generational knowledge transfer amidst large cyclical fluctuations

P03: Practice survival - knowledge transfer from older to younger employees in the midst of redundancies

How did the good practices in *DK03 Cement* survive? First, redundancies were in some cases voluntary across the labour force, regardless of age, but more financially attractive to older workers with a service-related enhancement on offer and with a possible intention to retire already in their minds which they decided to bring forward. So the exit from the workforce was disproportionately drawn from older employees. However, what was, on the face of it, the most vulnerable practice, namely the 'successor programmes' did survive in spite of very high redundancy and its potential effects on the attitudes of those facing redundancy in terms of their willingness to co-operate. These embodied the most positive element of knowledge sharing on the part of the older employee who was invited to take part in the training and development of a younger co-worker, in some cases receiving a bonus payment for doing so.

(14) Driver: Dynamic sectoral change requiring a demanding knowledge and skills base among an ageing workforce

P04: Age management at the intersections of organizational and individual life-cycles – maturing organizations and maturing employees

In contrast to construction and its supplier industries, IT and related consultancy services are associated with fast product and process innovation and a rapid evolution of knowledge and skills required to support business developments. In some parts of the industry, work is highly project-based and companies manage variations in volume, type of work and client location by using relatively high proportions of self-employed professionals and/or engaging in extensive contracting out to smaller more specialized enterprises. At the same time, IT service companies are, themselves, the beneficiaries of the contracting out of IT-related functions from client organizations. Thus,

companies can be faced with quite a volatile workforce situation where a successful long-term growth strategy is accompanied by periodic staff cuts as market conditions fluctuate. Yet the development and retention of sufficient internal capacity is critical to that success.

The principal ingredients of an „age-management conundrum’ are then assembled for management to deal with. Although companies may have no problems in recruitment, they may have difficulty in retention. At the same time, the development and growth of this area of business services is now sufficiently well-established to produce work forces with significant proportions of older staff. Whilst the latter are a source of stability, they are also, by their own perceptions as much as those of management, a group with a particular need to keep updating their skills.

Particularly in the Dutch cases, regulatory changes made early exit routes much more expensive, promoting changes in HR policies and practices to enable people to work longer. In the example below the pressure has been exacerbated by the ageing of the company’s own workforce.

*(15) Driver: Ageing workforce and restricted early exit routes
P23: Work after retirement*

NL09 Chemical: The ageing of the workforce due to low turnover as well as changes in government policies regarding early retirement and disability leave led to the development of a strategic response. A multi-stakeholder group (including unions and works councils) set up in 2003 developed a number of recommendations for extending working lives as part of a comprehensive approach, which received renewed emphasis in 2005 and 2008. As a result, HR was professionalised, employment conditions were modernised and the Work Ability Index was introduced, following initial resistance. However, other measures did not get off the ground at first (e.g. flexible working, which is now seen as more feasible as it worked during a spell of short term work during the recession) or are still on the agenda (i.e. a mid-career orientation programme due to lack of HR capacity).

New legislation introduced to prevent age discrimination may put age-specific measures under pressure, as the example below demonstrates.

*(16) Driver: EU social regulation
Pathway diversion – legislation as a driver for extending senior privileges more widely*

Some of the *DK03 Cement* practices described under (12) above, whilst beneficial to older workers and the company were overtly discriminatory in favour of older people and, from 2008, it was obliged to change its approach in the light of legislation against age discrimination (of whatever kind). This led to reforming its measures around the notion of a „life stage policy’. The essential change was to base eligibility for the combination of choices relating to hours of work, pay and pension contributions not on age (over 57) but on length of service (over five years), leaving the period of its application at five years. The popularity of the scheme then extended beyond older employees to include younger employees with small children. Thus a win-win situation for seniors and employers was, in principle, turned into a win-win involving other parts of the work force too.

(c) Customers valuing older people's expertise and soft skills

In other cases the driver for the recruitment of older people has been an explicit recognition that customers value the expertise and soft skills of older employees, as examples (17) and (18) show.

(17) Driver: Retail competition via customer preference for service from older employees

P06: Customer need as the trigger for age management – tapping the unemployed and surviving the surplus-to-shortage transition

The drivers for policy re-design in the case of *DK02 DIY* were of meeting the preferences of *customers* through recruiting and retaining older staff who are 'service-minded' and have do-it-yourself experience. Moreover, beginning in a period of national labour shortage (2006), the company aimed initially at the integration or re-integration of the long-term older unemployed, opening it up to all older workers in the following year. Seen to be a success, another recruitment campaign took place in 2010.

Tapping into this segment of labour supply required an approach that was sensitive to basics - e.g. lack of literacy, negative feelings about the job search process - as well as to the need for training in particular product sales areas and on-site coaching. The *DK02 DIY* stores themselves were part of the recruitment strategy, using simple pamphlets to stimulate interest among customers, enabling contact details to be left on the spot, and using current seniors to do the initial informal follow-up by telephone before any interview by management was undertaken.

The financial crisis has hit many companies whose underlying employment trajectories were upwards and emphasized particularly the retention and/or recruitment of older people, turning labour shortages into surpluses. In the case of *DK02 DIY*, its departure from the growth path has precipitated layoffs of 20 per cent of the labour force during 2007-10. Yet the senior recruitment policy has been maintained, though shifting for the moment to retention strategies which emphasize the role of the personal development interview and its fairly standard agenda (see the examples above): consideration of job satisfaction, relations with co-workers, training needs, re-deployment, working hours, job content, family (especially caring) considerations and anticipation of potential retirement.

(18) Driver: Serving customers well and social responsibility of the owners

P06: Customer need as the trigger for age management (excluding 'tapping the unemployed and surviving the surplus-to-shortage transition')

PL03 Bakery The 'age management' strategy of this medium-sized company is driven by both the owners' engagement for social responsibility within and beyond the company and the added value the skills, experience and attitudes older workers bring to both the production and retailing of bread and bakery products. In particular, older people's soft skills boost customer loyalty and the steady life-style is seen as a good basis for working night shifts in production. Founded in 1992, the company could take advantage of a large supply of mature people in the local labour market after the end of the post-communist era as younger people could seek employment opportunities elsewhere. The family run business has since expanded into other geographical areas and currently employs more than 50% of employees aged 50 and over. Mixed age teams ensure that the skills are passed on from the older to the younger employees, and the company is keen to retain staff past their official retirement age on a full-time or

part-time basis on a different contract while maintaining wage levels. The company also offers a family atmosphere and adjustments to the workplace where necessary.

6.4 Conclusions

The drivers for the adoption of age management initiatives in the ASPA ‚good practice‘ case studies reviewed above are those which come from within specific problem-solving behaviour by management in response to internal and/or external stimuli. Apart from the specific cases emphasized above there are some more general conclusions:

- macro-drivers often work alongside drivers that are more specific to the organization;
- there are many examples of age-management initiatives starting in a period of labour shortage where the impetus to make the best of the older workforce is strong but then moving into recession and labour surplus;
- sometimes the ‚baton‘ of age-management practice is handed from one area of HR policy to another as the business environment places a new mix of pressures on the organisation and previous age management initiatives are weakened whilst others come to the fore;
- however, the survival of age-management practices takes various forms and there can be evidence of resilience in the age management approach through what seems to be a progressive transfer of a ‚practice sensitivity‘ to age-related issues honed in one area to other areas, albeit sometimes very modestly;
- however, equality and diversity regulations are beginning to temper age-management strategies that favour seniors by extending similar rights to flexibility of working arrangements, task allocation, opportunities for training and development, etc. to other workforce groups.

7. Conclusions

This part of the ASPA project has sought both to add evidence to what constitutes age-management good practice at the turn of the decade and to explore new ways of generating an understanding of its various elements.

It is important not to treat our collection of case studies either as being representative of good practice cases in particular dimensions of HR policy or of organisations as a whole. However, they have generic significance that can be exploited so as to extract insight for both policy-makers and organisations. We may err on the side of „over-interpretation’ or slip into making unduly representative statements but these are inevitable tensions in this kind of research. Similarly, we may gloss over the extent to which and from which perspective they may show ‚good practice’.

The central role of organisational perceptions and behaviour in extending working lives

In-company approaches are the core of an ‚active’ and future-orientated age-management policy. Whether older workers might be able to stay in working life longer or not is primarily determined within organisations. In this context the arrangement of adequate workplaces which meet the needs of older workers is of particular importance (for example, in terms of workload, working time, work environment, and job design).

The analysis of case studies from eight countries concludes that demarcations between the dimensions of age management are blurred and that these demarcations differ depending on the national context. Possible criteria for highlighting case studies have been: the fulfilment of objectives, the transferability of measures, their innovative character, and consistency in age management policies.

Overall, the case studies offer a good selection of measures in almost every dimension. There are good measures in every country, although access to companies may be more difficult in some countries than in others and the assessment of the quality of good practice may differ. It is also a positive sign that there are several examples of comprehensive age management strategies, notably in Germany, the U.K., the Netherlands and Poland. In the absence of integrative strategies, isolated measures may also serve the purpose of integrating workers of any age into employment. Note also that, even in the absence of codified policies, the firm may have *ad hoc* policies when the need for action emerges (e.g., re-integration after long-term illness).

Training and knowledge transfer and the part ‘in between’

What seems clear is that much effort in our case-study organisations is devoted to the areas of training and knowledge transfer. Somewhere in that experience is also the notion of lifelong learning, partly because, from the point of view of the individual older worker, personal career development involves both.

Measures in the field of training, lifelong learning and knowledge transfer are most often evident in our case studies. However, their situations, as observed, seem to grapple with, on the one hand, ‚training’ and, on the other, ‚knowledge transfer’; the idea of ‚learning’ plays at best an ambiguous and at worst a non-existent part. This scope for capitalising on the underlying competences of older workers through promoting their continuing work-based learning is a particular area requiring more thinking about policy and practice. This is different from a focus on ‚training’ them for development or different tasks or ensuring they are adequately ‚de-briefed’ in relation to their existing knowledge and skills.

Other dimensions of practice

In addition, measures in the dimension health promotion and protection and workplace design, as well as in the dimension of flexible working practices are often integrated into age management. In the field of remuneration, our case studies threw up far fewer examples of and more diverse opinion about what is 'good practice' among both practitioners and researchers. Despite the fact that one third of organisations practised non-discriminatory recruitment, at least for most positions, it was difficult to distinguish innovative and transferable measures there which do not have the character of an *ad hoc* policy.

The effects of some measures may be disputed - e.g., as regards flexible working practices, it is important to consider together gains for management in being able to respond better to peaks in its demand for labour and the gains for workers in terms of work-life balance. Some firms have also implemented contradictory measures in age management – e.g. outplacement of services on the one hand, and reintegration of workers with health limitations on the other hand. Similarly, policies to retain existing older workers may coexist with recruitment practices which discriminate against them.

Age-management comparisons

Measures in the ten identified dimensions are neither typical of a given branch or country. There are good practice examples in every country and in every branch. Nevertheless, clustered solutions per branch or some typical foci per country have emerged in the analysis. Overall there is a good mix of branches, although there were countries focusing on specific branches (construction in the case of Germany, health and social services in the case of Italy). Rather than differences between branches, certain similarities within a branch could be found depending on the economic and institutional framework (e.g. the trend to outsource personnel in post and telecommunications firms sparked by cost reduction pressures on a liberalised market).

We must be careful in drawing from a particular set of case studies conclusions that appear to represent the situations in eight countries and numerous economic branches. The following comments can, at best, be suggestive.

With regard to the legal form of the organisation, privately-owned, profit-oriented firms dominated by far (they formed two thirds of the sample). Private firms seem rather to externalise personnel adjustment problems while public organisations tend to seek to solve them internally, e.g. with the help of switching to individually-chosen work shifts in transportation companies in order to decrease stress and enable a better work-life balance.

Firms with more than 250 workers are over-represented among our cases. However, good practice in age management has been implemented in firms of any size, although the challenges and facilitators are different. Smaller organisations are more autonomous in their decisions and can react more immediately to approaching problems.

There are also national idiosyncracies, which are visible in dimensions of good practice followed by countries and in the role social partners at firm level play in the introduction of initiatives.

Some implications for policy-makers, corporate actors and social partners:

- Branch challenges and common trends across countries (in health services, in public transportation companies, in other liberalised markets such as energy, post and telecommunications), suggest that trade unions at European level are in the course of developing transnational and European-wide agreements, e.g. on disadvantaged workers'

groups⁷.

- Areas within public administration, such as the police, army, fire brigades or the judiciary, are faced with age-related problems but are under-represented both in our cases and in national databases of good practice (with the apparent exception of the Netherlands and Germany). Good practice in these areas (e.g. horizontal job mobility for older executives at *NL07 Police*) should be promoted more strongly.
- Also worth promoting are innovative solutions for jobs with limited tenure, like classical ballet or elder care. Those challenges can be approached both from the angle of career development (e.g. *FR05 Waste* trains semi-skilled and unskilled workers and deploys them later as refuse truck drivers, forklift truck operators and cab supervisors) or health management (e.g. *UK01 Ballet* offers advice and rehabilitation through a specialist centre to help to prevent injury and promote good health).
- In order to embed good practice in a sustainable way in corporate strategies and practice, company actors could transfer successful initiatives in enabling us to visualise better the effects of age management, e.g., *DE11 Steel processing* has made some progress towards including 'soft' effects of health management in regularly-conducted balance scorecard analyses.

All in all, while the issue of age-management has a relatively prominent place in debates in some countries (e.g. Germany, the Netherlands), elsewhere it has still a low profile. The transferability of international benchmarks and practices between Member States is rather uncritically assumed (cf. European Foundation 2006; OECD 2006). The prevailing differences between welfare state models have tended to be neglected and recommendations need to be more specifically tailored to national differences in socio-economic policy environments. A pre-condition for the success of further EU- and national policies on active ageing is also a stronger involvement of the social partners at the European, national and sectoral levels.

Experience with pathways of practice

The method of analysis of case studies described in Chapter 5 has been articulated not from the point of view of identifying a specific dimension of age-management and „good practice’ exponents of it but so as to identify types of pathway of practice. The focus has been on the dynamics of practice:

- the changing motives behind the use of an age management measure or combination of measures
- the way different dimensions and combinations of dimensions may be deployed at different times

⁷ In the „Joint analysis of the key challenges facing Europe’s labour markets’ (ETUI and UNICE 2007), the social partners state that in the light of future reduction of the workforce due to demographic ageing, continuous training and skills upgrading is particularly important for older workers and that this has to start early on and be part of a broad active ageing and lifelong learning strategy. In consequence, the implementation scoreboard of the 2006-2008 work programme mentions that either an autonomous framework agreement on the integration of disadvantaged groups on the labour market or life long learning will be negotiated). However, in contrast to autonomous agreements of the social partners at EU-level concerning e. g. work-related stress (2004) and inclusive labour markets (2010) or the framework agreements adopted by Council decision on parental leave (2009), no formal decision-making on the issue of disadvantaged groups - which would certainly have to include older workers - has taken place or is planned in the near future (ETUI 2009). Neither has the framework action plan on lifelong learning - which was negotiated in 2002 - been elaborated further into a framework agreement.

- how the impetus for policy and practice may switch between different levels of the organization with implications for the balance between measures adopted
- the influence of changes in labour market conditions
- the internal or external triggers for age management that come from workers or customers, respectively

The aim has been to gain further understanding from paying attention to journeys not simply destinations.

Drivers of age management

The drivers for the adoption of age management initiatives in the ASPA ‚good practice’ case studies reviewed in Chapter 6 are those which come from within specific problem-solving behaviour by management in response to internal and/or external stimuli. Apart from the specific cases emphasized there are some more general conclusions:

- macro-drivers often work alongside drivers that are more specific to the organization;
- there are many examples of age-management initiatives starting in a period of labour shortage where the impetus to make the best of the older workforce is strong but then moving into recession and labour surplus;
- sometimes the ‚baton’ of age-management practice is handed from one area of HR policy to another as the business environment places a new mix of pressures on the organisation and previous age management initiatives are weakened whilst others come to the fore;
- however, the survival of age-management practices takes various forms and there can be evidence of resilience in the age management approach through what seems to be a progressive transfer of a ‚practice sensitivity’ to age-related issues honed in one area to other areas, albeit sometimes very modestly;
- however, equality and diversity regulations are beginning to temper age-management strategies that favour seniors by extending similar rights to flexibility of working arrangements, task allocation, opportunities for training and development, etc. to other workforce groups.

Although it is possible to be quite positive about some good practice cases in terms of the pathways they have followed, the experience of the present economic crisis sounds a general note of warning. The importance of age management can be downplayed especially when youth unemployment is at very high levels. Yet it is in the interests of all workers in the long term to ensure that organisational mechanisms exist that sustain productive working lives beyond their current horizons in many countries. The ASPA project has sought to introduce more recent evidence of age management practice and develop ways of analysing it. It is hoped that this will help those at national and EU levels to have a better understanding of its dimensions and the sorts of pathway taken by the organisations whose behaviour they wish to influence.

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ASPA

**WP4: Good practice in age-management-
interview guidelines for case studies in labour
organisations**

OVERVIEW

This paper consists of three sections:

- A. Introduction to the Interview guidelines
- B. Interview guidelines
- C. Template for the case studies

A. INTRODUCTION TO THE INTERVIEW GUIDELINES

Introduction: The following interview guidelines are intended to assist researchers with the collection of key information for the case study reports. These guidelines need to be read in conjunction with **WP4 Orientation and Literature Review**, which provides further details on the selection and the general outline of the case studies.

Types of case studies: In some instances companies will be re-interviewed to follow up their progress on a measure developed a couple of years ago (henceforth referred to as 'long standing measure' or 'case A').

In other instances we will interview companies which have not been the subject of earlier research and are likely to have been selected because of a more recent measure (henceforth referred to as 'no long standing measure' or 'case B'). The interview guidelines are designed to cover both these cases, but slight alterations were needed to suit their situation.

Structure of the guidelines: The guidelines contain 5 sections:

1. Organisational background
- 2A. Original measure – long standing measure
- 3A. Development of original measure and current practice – long standing measure
- 3B. Current practice and how it has evolved – no long standing measure
4. Overall age management approach: past, presence and future
5. Finalising the interview

Having gained some background information about the organisation the interview will first focus on the measure⁸ which led to the selection of the company. In case A, this will be the original measure and how it evolved since then and in case B the current measure. The interview will then progress to discuss the overall age management approach.

In practice, the order may be handled more flexibly as interviewees may already begin to address areas which are due to follow later on. In some instances it may be more helpful to follow the explorations of the interviewee, up to a certain point, as long as all areas are covered.

Since there will be too many different initiatives and measures (health, recruitment, training etc.) and possible cases (different organisation sizes, sectors etc.) to cover all eventualities with specific questions, the guidelines are conceived as a relatively open and flexible instrument to gather relevant information. The questions contained therein can be understood as 'central questions' and mirror the information required for reporting the case studies. The national partners can and should supplement these questions with further specific questions concerning the concrete individual case. Thus these guidelines represent the minimum of information required.

It may be advisable to prioritise the interviews thematically, depending on the information/expertise of the interviewee. In other words, it may be possible to consider the choice of primary focus of a particular case study so as to achieve a degree of 'balance' in the range of policy measures covered by the collection of 12 national case studies and in the overall WP4 collection of cases.

Who and how many to interview?: It is difficult to specify precisely who best to interview *a priori* as this depends on the type of measure and the size of the employing organisation. The primary source of data in large to medium sized companies are likely to be representatives of HR/personnel departments, with additional key information on the employee perspective provided by the work council/trade union. Furthermore, other key interviewees could be occupational health professionals, staff in training departments, pension fund managers or top managers. As far as practicable, all those with significant responsibility for the initiative/practice/policy or those who can speak with authority about it should be interviewed.

Although, in a larger project, there would also be some value in interviewing employees individually or in groups, it is not expected that WP4 will have the resources to do this. However, where good opportunities arise for this to be done, partners are encouraged to consider taking them up.

In small companies the key interviewee is likely to be the proprietor or the general manager, whoever has most involvement in the measure.

The data will initially be collected through a site visit. Where further information needs to be collected - for example because not all interviews could be arranged during the

⁸ Measure has been used as a generic term, comprising initiatives, policies and other practices, to facilitate the readability of the text.

site visit - a telephone follow-up interview may be considered for reasons of practicability.

It is intended that twelve case studies be completed per country.

What do we mean by good practice?: ‘Good practice’ in this field is broadly defined as measures aimed at combating age barriers in employment and/or promoting age diversity and/or intergenerational relations. Such measures do not have to be specified as for ‘older workers’, providing they have a beneficial impact on this group such as promoting their recruitment or retention.

‘Pathways of practice’: Good practice cases may emerge during ‘pathways of practice’ (see *WP4 Orientation and Literature Review*) which are not simply journeys towards good practice policy destinations but may involve retracing steps and adopting new directions. Interviewers are encouraged to seek a dynamic understanding of organisational development.

Preparation: The case studies and especially the case study interviews should be prepared carefully. Available material on the examples of good practice should be reviewed prior to undertaking the interviews/case studies.⁹ During the preliminary stages of the case studies, the required structural data on the case study and names of the appropriate interviewees should be requested.

Anonymity: If possible, the companies should be named and not stay anonymous for the use at the web-page of ASPA. The argument for naming the company is to make them more convincing as exemplars for other companies and to make it possible for the latter to contact the former if they wish. However, there are likely to be some cases where they have been included as giving valuable experience of and understanding of ‘pathways of practice’ as opposed to ultimately desirable organisational policy ‘destinations’ regarding age management. The organisations concerned may prefer anonymity.

There is also a scientific argument for leaving case study organisations anonymous and this is to guard against the danger of being less critical just to be able to publish them. In this respect it is also important to note that approval from case organisations for posting information about their experience on the web may be time consuming. If this is the case, a possible solution could be to allow for anonymity when publication otherwise will not be compatible with either the willingness of the organisation to have its case represented publicly and the need for scientific accuracy.

Review: Once every team has had a chance to undertake the first one or two case studies it would be helpful to receive further comments on the interview guidelines before our December meeting in Bremen so that the guidelines can be modified, if necessary.

⁹ The respective sources and references are documented in Deliverable 4.1 – WP4 Orientation and Literature Review.

B. INTERVIEW GUIDELINES

1. ORGANISATIONAL BACKGROUND

Aim: This section aims to gather relevant background data of the company, its workforce and the environment in which it is operating. It is intended to capture some of the dynamics of organisational development rather than painting a static picture.

Additional information about the establishment may be useful for writing up the case study (e.g. annual reports, policy statements) either gained through the organisation's website or a hard copy handed out during the interview. If the company is going to be re-interviewed most of this information will have already been collected but may need up-dating.

Topic list

- **Company details**
 - Name, date of establishment; location;
 - legal form (including, reference to regional, national, international scope or ownership);
 - sector and snappy description of type of goods or services,
 - size of employer (number of employees in local unit, country wide and internationally, if applicable) and how this compares to a couple of years ago;
 - turnover (or income/'business volume' in non-profit companies) and how it compares to a couple of years ago;
- **Workforce structure**
 - composition by demographic data: gender, age, [first (and second) generation migrants - only in case studies where this was a key criteria for the selection of the case study - see Deliverable WP 4.1]
 - qualification structure,
 - percentage of blue/white collar workers (where appropriate);
 - percentage of staff who work part-time work;
 - labour turnover rate;
 - staff shortages or labour supply problems (If so what employee groups are affected and why)
- **Key organisational challenges** the company is currently experiencing (e.g. economic downturn, particular workforce issues or technological development)
- **Role of the social dialogue**
 - Existence of trade union or work council representation and whether they are strong or a weak force;
 - Details on collective agreements that affect in particular older workers (content, date they came into effect, agreed between which parties)

2A THE ORIGINAL MEASURE (*long standing measure*)

Aim: This section aims for a comprehensive overview of the rationale and context of the original measure and a detailed description of the measure.

In practice, all or most of the information will be available already in the form of a written report. In this case, this part of the interview will present a summary of the previous good practice case study and probe on any information gaps that may exist or any differing assessments which may be offered during the interview. The topics below will only be worth exploring if a particular strand merits further investigation rather than exploring further particulars, they are listed here as an aide-memoire. However, a new job holder may not be familiar with the situation a couple of years ago, and thus may be unable to comment.

Topic list

- **Rationale and context**
 - Reasons for implementing the measure (including an overall assessment of which factors dominated: internal one, e.g. organisational changes, or external ones, e.g. labour market situation or changes in the relevant legal framework such as pension schemes)
 - People involved in the design and implementation process and their respective role (e.g. HR, other departments, staff representatives, role of the social dialogue/collective bargaining)
- **Detailed description of the measure**
 - Including details on the items in the box below

- type of measure;
 - aims and objectives of the measure;
 - target group(s) and eligibility criteria (if appropriate);
 - geographical coverage (if applicable);
 - age structure of the people taking part (if details available),
 - gender dimension of the measure (was gender considered in designing or implementing the measure? Do women participate to a greater or lesser extent than men? Why is this?);
 - single initiative or part of a more comprehensive measure;
 - extent to which the original measure/practice had a life-course or life cycle dimension; reasons for this;

- Explore whether this concurs with what is done in practice (if there are differences what are they and why is this the case)

3A. DEVELOPMENT OF THE ORIGINAL MEASURE AND CURRENT PRACTICE (long standing measure)

Aim: Having established the rationale and the particulars of the original measure from the original case study report this section aims to establish how the measure has evolved since it was first established in terms of its nature and scope; the nature and rationale for modifications, if any; its effects and outcomes over time, what factors have facilitated or hindered the outcomes and an assessment of the transferability of the measure.

Topic list

- **Development of the original measure and current practice**
 - Changes to the measure itself since it was first implemented (thematic shift or continuation of the original one with or without slight alterations with regard to the items in the box below)

- aims and objectives of the measure;
 - target group(s) and eligibility criteria (if appropriate);
 - geographical coverage (if applicable);
 - age structure of the people taking part (if details available),
 - gender dimension of the measure (consideration of the gender aspect during the design or implementation of the measure; gender differences in participation rate)
 - single initiative or part of a more comprehensive measure
 - extent to which the measure/practice has a life-course or life cycle dimension; reasons for this

- **Rationale and context of the changes, if applicable**
 - Reasons for implementing the measure (including an overall assessment of which factors dominated: internal one, e.g. organisational changes, or external ones, e.g. labour market situation or changes in the relevant legal framework such as pension schemes)
 - People involved in the design and implementation process and their respective role (e.g. HR, other departments, staff representatives, role of the social dialogue/collective bargaining)

- **Impact and outcomes** (probing for effectiveness and the 'business case')
 - Overall impact of the measure in terms of
 - meeting its aims and objectives,
 - people taking part in/benefiting from the measure,
 - ongoing impact on the employability of older workers?
 - direct benefits of the measure (e.g. better skills, better health)
 - wider intended or unintended benefits of the measure (e.g. impact on profitability, competitiveness, staff commitment, quality of work, reduced sickness/absence, changed attitudes, age structure)
 - any negative impacts on the organisation resulting from the initiative (e.g. impacts on other groups)
 - cost-benefit assessments (estimated overall costs of the measure and savings; whether, on balance, the benefits outweigh the costs or the other way round)

- Aspects of the measure which can be considered as success, aspects that did not work well and reasons for this
- Assessment of the sustainability of the measure and reasons for this
- **Factors helping or hindering the success of the measure**
 - Key factors which affected the measure in a positive or negative way (e.g. internal conflicts, participation of employees, quality of social dialogue, organisational, structural and technological change) and how the negative factors have been tackled
 - Role of the external economic, labour market and environmental conditions that have accompanied and affected the measure (e.g. government policy or the prevailing business context at that time) and the interplay with the organisation's policy (e.g. partial retirement).
- **Transferability of the measure**
 - Key learning points which would be useful for another organisation to know;
 - In particular, relevance of local and political conditions, the legal and economic framework and the organisational features for the transferability

3B. CURRENT PRACTICE AND HOW IT HAS EVOLVED

(no long standing measure, i.e. this is a company for which no previous case study is available/accessible to the researchers). This section combines elements of Section 2A and 3A.

Aim: This aims of this section is to get a comprehensive overview of the rationale and context of the current measure, a detailed description of the measure, its outcomes and the factors which facilitated or hindered the measure. In addition, it aims to explore, as far as possible, the developments which have led up to the current practice. It also explores the sustainability of the measure and its transferability.

Topic list

- **Rationale and context**
 - Reasons for implementing the measure (including an overall assessment which factors dominated: internal one, e.g. organisational changes, or external ones, e.g. labour market situation or changes in the relevant legal framework such as pension schemes)
 - People involved in the design and implementation process and their respective role (e.g. HR, other departments, staff representatives, role of the social dialogue/collective bargaining)
 - The question of financing should also be addressed - was there a dedicated budget in the company; did it involve separate departmental decisions on the allocation of funds; was it associated with follow-up from appraisal/review of employees?
 - Did the company evaluate the effect of resourcing this measure?

- **Detailed description of the measure**
 - Including details on items in the box below

- type of measure;
 - aims and objectives of the measure;
 - target group(s) and eligibility criteria (if appropriate);
 - geographical coverage (if applicable);
 - age structure of the people taking part (if details available),
 - gender dimension of the measure
(was gender considered in designing or implementing the measure?
Do the participation rates of women and men differ? Why is this?)
 - single initiative or part of a more comprehensive measure
 - extent to which the original measure/practice had a life-course or life cycle dimension, reasons for this

 - Explore whether this concurs with what is done in practice (if there are differences what are they and why is this the case)

- **Impact and outcomes** (probing for effectiveness and the 'business case')
 - Overall impact of the measure in terms of
 - meeting its explicit aims and objectives,
 - people taking part in/benefiting from the measure,
 - impact on the employability of older workers still ongoing

- direct benefits of the measure,
 - wider intended or unintended benefits of the measure (e.g. impact on profitability, competitiveness, staff commitment, quality of work, reduced sickness/absence, changed attitudes, age structure)
 - any negative impacts on the organisation resulting from the initiative
 - cost-benefit assessments (estimated overall costs of the measure and savings; whether, on balance, the benefits outweigh the costs or the other way round) – ask for actual figures if available.
 - Aspects of the measure which can be considered as success, aspects that did not work well and possible reasons for this
 - Assessment of the sustainability of the measure and reasons for this
- **Factors facilitating or hindering the success of the measure**
 - Key factors which affected the measure in a positive or negative way (e.g. internal conflicts, participation of employees, quality of social dialogue, organisational, structural and technological change) and how the negative factors have been addressed. Most of the above are 'internal' factors.
 - Role of the external economic, labour market and environmental conditions that have accompanied and affected the measure (e.g. government policy or the prevailing business context at that time) and the interplay with the organisation's policy (e.g. partial retirement).
- **Evolution of the measure since it was implemented** (if appropriate, given the time which has elapsed since the implementation of the measure)
 - Modifications of the measure since it was first conceived and implemented
 - Key actors involved in negotiating changes
 - Reasons for changes
- **Transferability of the measure**
 - Key learning points which would be useful for another organisation to know;
 - Relevance of local and political conditions, the legal and economic framework and the organisational features

4. AGE MANAGEMENT PRACTICE

Aim: In addition to exploring good practice with regard to a particular measure, we are aiming to explore the company's overall age management practice, how it has evolved over the years, what has been driving the developments and how it may change in future.

The section puts the specific measure within the overall context of age management. Furthermore, by exploring changes over time (past, present and future), this section provides an additional angle on the analysis of pathways of practice.

Note the issue of capturing *pathways of practice* identified in the Introduction to these Guidelines.

Topic list

- Changes in the general approach to age management over the years and what has affected it, in particular the role of
 - the changing labour market conditions
 - the economic performance of the organisation
 - the context of the organisation and
 - wider societal factors (e.g. discussion about 'demographic change')
- Type of age management approach adopted (life-course or age cohort/group approach) – defined by interviewee/company/researcher - and reasons for it
- Existing policies, measures and practices which support or facilitate the employability of older workers
Note in small companies it will be more appropriate to talk about practices which support or facilitate the employability of older workers rather than policies or measures.
- Existing policies (e.g., diversity or equal opportunities policy; special leave for carers, including for carers of older relatives)
- Particular measures in place, other than the one already discussed
Please go through the list, ask for brief details. If there are too many measures concentrate on the two most important

- Job recruitment
- Awareness raising, changing attitudes and diversity
- Training, lifelong learning and knowledge transfer (including mixed-age teams)
- Career development and mobility management
- Remuneration, i.e. consideration of bonus and salary systems
- Flexible working practices (including working-time arrangements over the life-course and reconciliation of work and family life/care)
- Health protection and promotion and workplace design (ergonomics, job design and accident prevention)
- Health and well-being
- Redeployment and retention
- Employment exit and the transition to retirement

- Comprehensive or holistic approaches (i.e. measures in all areas are geared to help address age management in a mutually-reinforcing way (i.e. improve recruitment and retention of older workers))

- In what way, if any, does the remuneration system (pay and benefits) provide a *disincentive* for recruiting or retaining older workers? Please address this specifically.
- Esteem of older workers within the company
- Policies or measures in place which seem to undermine good practice age management but are pertinent to achieve other business objectives
- Impact of current economic climate on employability of older workers within the company
- Envisaged future approaches to age management:
 - next steps, future plans and objectives,
 - how age management is linked to the future of the organisation
 - what needs to be done and by whom to improve age management.

5. FINALISING THE INTERVIEW

- Collect contact details of the interviewee (name, address, email, company web address)
- Discuss arrangements for the case study report to be sent to the interviewee for commenting and allow adequate time for this. This is not to guarantee to change the interpretation (though there may be agreement to delete something in the version to be published). The aim is to identify any points of inaccuracy or anything they would like the researchers to keep in mind when finalising the report.

C. TEMPLATE FOR THE CASE STUDY

Case Study: [Type of measure], [Organisation], [Country]

We are looking for a case study report that reads well and addresses the key areas set out below. The ideal length would be 4 to 5 pages (around 2500 words).

Executive summary (250 words maximum)

Short overview of key company and workforce characteristics, overall age management strategy, the measure itself, its evolution, and its successes and pitfalls.

1. Organisational background (250 words max.)

Comprehensive text that answers the questions from section 1 of the guidelines; This section describes the following: sector, company size, workforce structure and the nature and role of social dialogue

2. Age management approach (500 words max.)

Comprehensive text that answers the questions from section 4 of the guidelines; This section looks at the overall approach to age management, how it has developed over time and what has driven it. This will include the nature and development of any HR policies which underpin or support age management. Furthermore, the section provides particulars of good age management initiatives in areas other than the original or current initiative. It also explores whether there are areas of bad practice (i.e. initiatives which seem to undermine the employability of older workers) and how they came about. It also discusses changes regarding age management or particular initiatives within the next couple of years the company may envisage.

3. The original measure (500 words max.)

This only applies if it is a long standing measure.

Drawing on the previous case study report and possibly additional lines of enquiries this section provides comprehensive answers to the questions in section 2A of the guidelines. In particular, the section focuses on the rationale/context of the original measure, the nature and details of the measure, and, drawing on the previous case study report, the impact and the factors which have facilitated or hindered it.

4. Development of the initial measure and current practice? (750 words max.)

If it is a long standing measure:

Comprehensive text that answers the questions from section 3A of the guidelines; In particular, the section focuses on how and why the measure has evolved and what the outcomes were. It also explores whether the measure is sustainable and potentially transferable to other companies.

If it is not a long standing measure this section will be entitled:

Current practice and how it has evolved (1000 words maximum)

Comprehensive text that answers the questions from section 3B of the guidelines; In particular, the section aims to explore retrospectively how the measure came about, its rationale, nature and details of the measure, its impact and the factors which have facilitated or hindered it.

5. Concluding reflections from the researcher (250 words max)

What was important for the context of the interview(s)? Particular points of concern about capturing fully enough the perceptions that different actors might have of the company's experience.

Contact details: Contact person and email address (if available); source(s): document title or organisation's website

Annex 2: Consolidated case study list

Alias	Name of organisation	Legal form (public/private /non profit)	Branch of economy NACE code rev. 2.0 (if multiple, grouped under main - in bold)	Size	Dimension of good practice	Long-standing case (yes, no, unknown) Duration
DENMARK						
DK01 IT	KMD	Private	Information Service Activities (J63)	1000	- 2 - 4 - 6 - 7 - 8 - 9	Yes Since 2007
DK02 DIY	Silvan	Private	Retail Trade (G47)	2000	- 1 - 4	Yes Since 2007
DK03 Cement	Aalborg Portland	Private	Man. of other non-metallic mineral products (C23)	650	- 3 - 7 - 8 - 9	Yes Since 2007
DK04 Care	Sankt Lioba hjemmet (Home for frail elderly people)	Public	Residential Care Activities (Q87)	29 (50% are over 50 years of age)	- 2 - 3 - 4 - 6 - 7	No
DK05 Construction	Enemærke og Petersen A/S	Private	Construction (F)	550 (200 above 50 years of age)	- 2 - 3 - 4 - 6 - 7	Yes, but not documented before Since 2005
DK06 Municipality	Fanø Kommune (Municipality)	Public	Public Administration (O84)	284 employe es; 145 above	- 6 - 7 - other singular measures	No Since 2008

Alias	Name of organisation	Legal form (public/private /non profit)	Branch of economy NACE code rev. 2.0 (if multiple, grouped under main - in bold)	Size	Dimension of good practice	Long-standing case (yes, no, unknown) Duration
				50 years of age		
DK07 Hospital	Ålborg hospital	Public	Human Health Activities (Q86)	128	- 6 - 7 - other singular measures	Yes Since 2006
DK08 Training	Kofoed skole (school)	Public	Education (P85)	110	- 2 - 7 - 9	Yes Since 2003
DK09 Care	Vordingborg Municipal Home Care	Public	Residential Care Activities (Q87)	90	- 2 - 4 - 7 - 9	Yes Since 2002
DK10 Post	Post Danmark A/S	Private	Postal and Courier Activities (H53)	25,000	- 7	Yes Since late 1990s
FRANCE						
FR01 Nuclear	Nuclear company (anonymous)	Private	Manufacture of Basic Metals (C24) and Electricity, Gas, Steam a. Air Conditioning Supply	Ca. 30,000 (France)	Training (3), Career development (4), redeployment a. retention (8), Employment exit (9)	No Since 2008
FR02 Insurance	Insurance company (anonymous)	Private	Insurance (K65)	214,000	Job recruitment (1), Training (3), Career development (4), Employment exit (9)	Yes Since 2004
FR03 Automobiles	Automotive company (anonymous)	Private	Manufacture of Vehicles (C29)	68,000	Diversity (2), Training (3), Career development (4), Flexible working practices (6), Health promotion (7)	Yes (but put on ice in between) Since 2001
FR04 Aerospace	Aerospace company (anonymous)	Private	Manufacture of Computer, Electronic a. Optical Products (C26)	45,000 (France)	Health promotion (7), Redeployment a. retention (8), Employment exit (9)	Yes Since 1986
FR05 Waste	Waste disposal company (anonymous)	Public/private	Waste collection, treatment a. disposal activities, materials recovery (E38)	19,000 (France)	Job recruitment (1), training and transfer (3), career development (4), redeployment and retention (8)	Yes Since 2002

Alias	Name of organisation	Legal form (public/private /non profit)	Branch of economy NACE code rev. 2.0 (if multiple, grouped under main - in bold)	Size	Dimension of good practice	Long-standing case (yes, no, unknown) Duration
FR06 Care	Care home (anonymous)	Public	Residential care activities (Q87), Social work activities without accommodation (Q88)	102	Job recruitment (1), Training and transfer (3), career development (4), flexible working practices (6), health promotion (7)	No Since about 2008
GERMANY						
DE01 Machinery	KSB	Private	Manufacture of Machinery a. Equipment n.e.c. (C28)	4,000 p.	Job recruitment (1), Diversity (2), Training (3), Career development (4), Flexible working practices (6), Health protection (7), Redeployment and retention (8), Employment exit (9), Comprehensive approaches (10)	Yes Since 2001
DE02 Transport	Üstra – Hannoversche Verkehrsbetriebe	Public/Private	Land Transport (H49)	1,896 p.	Job recruitment (1), Training (3), Career development (4), Flexible working practices (6), Health protection (7), Employment exit (9), Comprehensive appr. (10)	Yes Since 1999
DE03 Administration	Kreisverwaltung Recklinghausen	Public	Public Administration (O84)	1,440	Diversity (2), Training (3), Career development (4), Flexible working practices (6), Health protection (7), Employment exit (9), Comprehensive approaches (10)	Yes Since 2005
DE04 Audio Equipment	Loewe AG	Private	Manufacture of Electrical Equipment (C27)	940	Job recruitment (1), diversity (2), training (3), career development (4), flexible working practices (6), health protection (7)	Yes Since 2005
DE05 Brewery	Bitburger Braugruppe	Private	Manufacture of Beverages (C11)	1,683	Diversity (2), Training (3), Flexible working practices (6), Health protection (7), Employment exit (9)	No Since 2007
DE06 Roofing	Dachdeckerbetrieb A. Plenkens	Private	Specialised Construction Activities (F43)	6	Training (3), Flexible working practices (6), Health protection (7)	Yes Since 1995
DE07 HVAC (heating, ventilation and air- conditioning)	Schalm	Private	Specialised Construction Activities (F43)	36	Training (3), Career development (4), Flexible working practices (6), Health protection (7), Redeployment and retention (8)	Yes Since 1997
DE08 Manufacturing	Manufacturing firm (anonymous)	Private	50% Man. of Other Transport Equipment (C30), 50% Man.	326	Job Recruitment (1), Training (3), Career development (4), Health	Yes

Alias	Name of organisation	Legal form (public/private/non profit)	Branch of economy NACE code rev. 2.0 (if multiple, grouped under main - in bold)	Size	Dimension of good practice	Long-standing case (yes, no, unknown) Duration
			Of Machinery a. Equipment n.e.c. (C28)		protection (7), redeployment and retention (8)	Since late 1990s
DE09 Metalworking	Manufacturing firm (anonymous)	Private	Metalworking (C)	70,000	Job recruitment (1), Diversity (2), Training (3), Flexible working practices (6), Health protection (7), Comprehensive approaches (10)	Yes, but not documented before Since 2004
DE10 HVAC	Schumann und Schulze Haustechnik	Private	Specialised Construction Activities (F43)	8	Training (3), Health protection (7), Redeployment and retention (8)	Yes Since 2001
DE11 Steelprocessing	Wurst Stahlbau	Private	Steel Construction (F41, F42)	180	Job recruitment (1), Training (3), Flexible working practices (6), Health protection (7), redeployment and retention, other (cost-benefit analyses), Comprehensive approaches (10)	Yes, but not documented before Since 2005
DE12 High-tech	Kayser-Threde	Private	Manufacture of Computer, Electronic and Optical Products (C26)	250	Job recruitment (1), Training (3), Career development (4), Flexible working practices (6), Health protection (7), Comprehensive approaches (10)	Yes (MEZ project 2005-2008) Since 2005
ITALY						
IT01 Care	L'Incontro	Non-profit cooperative	Social work activities (Q88); Residential care activities (Q87)	350	Job recruitment (1), Flexible working practices (6)	Yes Since 1992
IT02 Hospital	Santo Stefano	Private	Human Health Activities (Q86)	348	Training and knowledge transfer (3), Redeployment a. retention (8)	No PROJECT ENDED
IT03 Social	Atlante	Non-profit cooperative	Social Work Activities (Q86)	101	Job recruitment (1), Training and knowledge transfer (3)	No
IT04 Transport	Trieste Trasporti	Public/Private	Land Transport (H49)	835	Training and knowledge transfer (3), Flexible working practices (7), Redeployment a. retention (8)	Yes Since 30 years
IT05 Municipality	Municipality of Trento	Public	Public Administration (O84)	1,540	Job recruitment (1), Flexible working practices (6), Redeployment a. retention (8)	Yes, but not documented before Since 2005
IT06 Machinery	Savio Macchine Tessilit	Private	Manufacture of Machinery a. Equipment (C28)	416	Training a. knowledge transfer (3), Flexible working practices (6), Health	Yes Since 1960s

Alias	Name of organisation	Legal form (public/private /non profit)	Branch of economy NACE code rev. 2.0 (if multiple, grouped under main - in bold)	Size	Dimension of good practice	Long-standing case (yes, no, unknown) Duration
					protection (7), Redeployment a. retention (8), Empl. exit (9)	
IT07 Shipyard	Cantieri Riuniti Monfalcone	Private	Man. of Other Transport Equipment (C30)	1,702	Training and knowledge-transfer (3), Career development (4)	Yes, but not documented before Since 2003
IT08 Social	IDEA 45	Non-profit cooperative	Other Social Work Activities without Accommodation	13	Job recruitment (1)	Yes, but not documented before Since foundation in 2005
IT09 Machinery	TAUMAT	Private	Manufacture of Machinery a. Equipment (C28)	30	Job recruitment (1), Diversity a. awareness-raising (2)	No PROJECT ENDED
IT10 Education	Liceo Ancina Fossano	Public	Education (P85)	62	Training a. knowledge transfer (3), Employment exit (9)	Yes, but not documented before Since 2001
IT11 Hospital	ASL 4 Chiavarese	Public	Human Health Activities (Q86)	1,871	Training and knowledge transfer (3), Empl. exit (9)	No Since 2007
IT12 Machinery	Cometa	Private	Manufacture of machinery a. Equipment (C28)	60	Job recruitment (1), Diversity a. awareness-raising (2), Training a. knowledge transfer (3), Flexible working practices (6)	No Since 2007
NETHERLANDS						
NL01 Insurance	Achmea	Private	Insurance (K65)	18,445	Job recruitment (1), Diversity (2), Training (3), Career development (4), Flexible working practices (6), Health protection (7), Employment exit (9), Comprehensive measures (10)	Yes (Eurofound) Since 1980s
NL02 Education	Windesheim	public	Education (P85)	1,754	Training (3), Career development (4), Flexible working practices (6), Health protection (7), Employment exit (9)	Yes Since 2004/2005 (before, more age-specific policies)
NL03 Telecom	TNT / KPN Telecom	private	Telecommunications (J61)	10,350	Training (3), Career development (4), Flexible working practices (6), Employment exit (9)	Yes Since 2005 (before, compensatory measures for older workers and exit policies)
NL04 Construction	Construction company (anonymous)	private	Construction, Scaffolding (F)	870	Training (3), Career development (4), Health protection (7), Redeployment (8), Employment exit (9)	Yes Since 1998

Alias	Name of organisation	Legal form (public/private /non profit)	Branch of economy NACE code rev. 2.0 (if multiple, grouped under main - in bold)	Size	Dimension of good practice	Long-standing case (yes, no, unknown) Duration
NL05 Education	University (anonymous)	Public	Education (P85)	1,348	Training (3), Career development (4), Flexible working practices (6), Health protection (7), Redeployment (8), Employment exit (9)	No
NL06 Ministry	Ministry of Defense/CLAS	Public	Public Administration (O84)	22,930	Training (3), Career development (4), Employment exit (9)	No Since 2008
NL07 Police	Politie Haaglaanden	Public	Public Administration (O84)	5,200	Training (3), Career development (4), Flexible working practices (6), Redeployment (8), Employment exit (9)	Yes Since 2004
NL08 Chemical	Chemical company (anonymous)	private	Manufacture of Chemical Products (C21)	7,122	Awareness-raising (2), Career development (4), Flexible working practices (6), Health protection (7), Employment exit (9), Comprehensive approach (10)	Yes Since 1995
NL09 Chemical	Chemical company (anonymous)	private	Manufacture of Chemical Products (C21)	1,255	Changing attitudes (2), flexible working practices (6), health protection (7)	Yes Since 2003
NL10 Transport	GVB	Public/private (the municipality as largest shareholder)	Land Transport (H49)	4,305	Job recruitment (1), Training (3), Flexible working practices (6), Health protection (7), Redeployment a. retention (8)	No Since 2008
NL11 Research	Research institute (anonymous)	public	Scientific Research and Development (M72)	350	Job recruitment (1), Training (3), Career development (4), Health protection (7), Employment exit (9)	No Since 2009-2010
NL12 Municipality	Municipality (anonymous)	public	Public Administration (O84)	483	lifelong learning, knowledge transfer (3), Career development (4), remuneration (5), flexible working practices (6), health protection (7), Employment exit (9)	No Since 2009
NL13 Association	Professional membership organisation (anonymous)	private	Activities of membership organisations (S94)	213	Job recruitment (1), lifelong learning, knowledge transfer (3), Career development (4), health protection (7), Employment exit (9)	No

Alias	Name of organisation	Legal form (public/private/non profit)	Branch of economy NACE code rev. 2.0 (if multiple, grouped under main - in bold)	Size	Dimension of good practice	Long-standing case (yes, no, unknown) Duration
NL14 Construction	A. van Dongen B.V.	private	Construction (F)	32	Job recruitment (1), lifelong learning, knowledge transfer (3), flexible working practices (6), health protection (7), redeployment and retention (8)	Yes Since 2006
NL15 Construction	KuiperBouwgroep	Private	Construction (F)	50	Awareness-raising (2), Training (3), Flexible working practices (6), Health protection (7), Redeployment a. retention (8)	Yes Since 2007
POLAND						
PL01 Ships	CTO - Ship Design and Research Centre	Private	Manufacture of Other Transport Equipment (C30)	173	2, 3, 4, 7, 9	Yes Since 2004
PL02 Education	WORD - Wojewódzki Ośrodek Ruchu Drogowego, Olsztyn	Private	Education (P85)	82	1, 3, 9	Yes, but not documented before Since foundation in 1998
PL03 Bakery	KAMPOL, Legnica	Private	Man. of Food Products (C10)	100	1, 3, 9	No
PL04 Radio	EmiTel	Private	Broadcasting Activities (J60)	933	1, 3, 4	No Since 2008
PL05 Power	Vattenfall Heat Poland S.A.	Private	Electricity, Gas, Steam and Air Conditioning Supply (D35)	1,114	2, 3, 4, 7, 10	Yes (ActivAge) Since 2004/2005
PL06 Filters	Filter Service	Private	Man. of fabricated metal products (C25)	210	3, 5, 6, 7, 8, 9	Yes (Eurofound) Since mid-1990s
PL07 Cooperative A, Cooperative B, Cooperative C (= 3 cases)	Cooperatives: a) Spółdzielnia Socjalna "50+"; b) Spółdzielnia Budowlano-Mieszkaniowa „OAZA”; c) Radiotechniczna Spółdzielnia Pracy)	Cooperatives (one of them non-profit) = 2* private, 1*non-profit	a) Social Work Activities without accommodation (Q88) b) Construction (F), Real estate activities (L68) c) Manufacture of Electrical Equipment (C27)	a) 7 b) 18 c) 18	a) 1, 2, 3, 6, 7, 8 b) 1, 3, 6 c) 1, 3, 9	Yes, but not documented before a) since foundation in 2007 b) since foundation in 1993 c) since foundation in 1947

Alias	Name of organisation	Legal form (public/private /non profit)	Branch of economy NACE code rev. 2.0 (if multiple, grouped under main - in bold)	Size	Dimension of good practice	Long-standing case (yes, no, unknown) Duration
PL08 Power	Power plant (anonymous)	Private	Electricity, Gas, Steam and Air Conditioning Supply (D35)	470	3, 7	Yes [Aleksandrowicz 2009] Since 2005/2006
PL09 Kitchenware	TopRonic	Private	Manufacture of Electrical Equipment (C27)	86	Job recruitment (1), Training (3), Flexible working practices (6), Health promotion (7)	No
PL10 Bank	Bank (anonymous)	Private	Financial Service Activities (K64)	2,500	None	Yes (ActivAge, but HAS NEVER BEEN A GOOD PRACTICE EXAMPLE)
PL11 High-tech	High-tech corporation (anonymous)	Private	Manufacture of Computer, Electronic and Optical Products (C26)	2,000	None	No (NO GOOD PRACTICE)
PL12 Manufacturing	Manufacturing firm (anonymous) [ZEMAT]	Private	Manufacturing (C)	60	None	Yes (Eurofound, but HAS NEVER BEEN A GOOD PRACTICE EXAMPLE)
SWEDEN						
SE01 Automobiles	Volvo cars Torslanda	Private	Man. of Vehicles, Trailers a. Semi-Trailers (C29)	5,500	Career development a. mobility management (4)	Yes Since 1992
SE02 Plastic	Rapid Granulator AB	Private	Manufacture of Rubber and Plastic Products (C22)	101	None	Yes Since mit-1990s (NO GOOD PRACTICE acc. to German team)
SE03 Bank	Färs and Frosta Sparbank	Private	Financial Service Activities (K64)	235	3, 4, 6	Yes Since 2004
SE04 IT	Combitech	private	Information Service Activities (J63)	800	Training and knowledge transfer (3)	Yes Since foundation in 2006 (non-strategic)
SE05 Insurance	Sveland	Cooperative (private)	Insurance (K65)	61	Employment exit (9)	No
SE06 Union	Finansförbundet - Financial Sector Union of Sweden	Private	Activities of membership organisations (S94)	49	Job recruitment (1), Career development a. mobility management (4), Employment exit (9)	No
SE07 Housing	Poseidon	Public	Real estate activities (L68)	187	None	No

Alias	Name of organisation	Legal form (public/private /non profit)	Branch of economy NACE code rev. 2.0 (if multiple, grouped under main - in bold)	Size	Dimension of good practice	Long-standing case (yes, no, unknown) Duration
						(No GOOD PRACTICE acc. to German team)
SE08 Newspaper	Göteborgs Posten	Private	Publishing Activities (J58)	410	Training and knowledge transfer (3)	No
SE09 Construction	Bygga Värnamo	Private	Construction (F)	18	Flexible working practices (6), Health protection (7), Redeployment and retention (9)	No Since 2008 (non-strategic)
SE10 Signs	Floda System Skylt AB	Private	Manufacture of other fabricated metal products (C25)	15	Training a. knowledge transfer (3), Flexible working practices (6), Empl. exit (9)	No
SE11 Transport	Trollhättan Terminal (Katoen Natie)	Private	Land Transport (H49)	34	Health protection (7)	No
UNITED KINGDOM						
UK01 Ballet	Birmingham Royal Ballet	Non-profit (with 68% public funds)	Culture (R90)	187	3, 4, 7, 9	Yes, but not documented before Health protection and promotion focused in purpose-built medical facility opened in 2001. MA in Applied Dance Studies began 1997. Health promotion and injury prevention programmes will continue. Successful higher degree course should be sustained although major changes in Higher Education currently taking place make the environment unpredictable.
UK02 Recruitment	Eden Brown	Private	Employment Activities (N78)	230	Comprehensive approach (10)	Yes (EUF good practice case study published in 2005 and classed as comprehensive and still viewed as comprehensive) Awareness raising campaign launched in 2005 - in the process of being re-launched in 2010. Both campaigns preceded changes in legislation
UK03 Care	Care Home (anonymous)	public	Residential Care (Q87)	67	Comprehensive approach	Yes, but not documented before Measures have been in place for some time but no specific year indicated when measures were introduced (likely to be more

Alias	Name of organisation	Legal form (public/private/non profit)	Branch of economy NACE code rev. 2.0 (if multiple, grouped under main - in bold)	Size	Dimension of good practice	Long-standing case (yes, no, unknown) Duration
						than three years ago)
UK04 Training	Vocational Training Charitable Trust	Non-profit	Education/Awarding body (P85)	98	Training and development (3, 4)	Yes, but not documented before Major restructuring in 2008 led to developing HR practice and two training opportunities in 2009-2010. NVQ Level 2 Customer Service CMI Level 5 Diploma in Management Training Aim is to continue up-skilling the workforce through appropriate training.
UK05 School	St. Edward's School	Private	Education (P85)	410	Training and development (3), 9	No NVQ training over 18 months in 2009-2010. Changing HR framework over past 3 years. Intention to continue specific NVQ training; however this relates to cost, given current national cutbacks.
UK06 Telecom	British Telecom	Private	Telecommunications (J61)	80,000 (UK)	Comprehensive approach (10) (but note in particular 6,7,8 and 9)	Yes (EUF anonymous good practice case study published in 2005 and classed as flexible working practice in 2005 and as comprehensive now) International Innovative Employer award in 3 consecutive years since the award was first launched in 2007 In early 2001 BT introduced its flexible retirement, since 2005 abolition of fixed retirement age WorkFit programme launched in 2005 Carers' network for people with caring responsibilities since 2010
UK07 Call Centre	Domestic & General Call Centre	private	Office administrative, office support a. other business support activities (N82) and Insurance (K65)	900	Comprehensive (10) (but note in particular 1, 7 and 9) (and also 4 and 6)	Yes (Age positive publications, 2008/09 AARP International Innovative Employer award) Sources: various snippets in DWP (Department for Work and Pension) publication issued in 2007 but policies/practices will have been in place for

Alias	Name of organisation	Legal form (public/private /non profit)	Branch of economy NACE code rev. 2.0 (if multiple, grouped under main - in bold)	Size	Dimension of good practice	Long-standing case (yes, no, unknown) Duration
						a while by then.
UK08 Retail	Lingerie company (anonymous)	private	Retail trade (G47)	726	1, 3, 4, 6, 8	Yes, but not documented before Since its foundation in 1995, company has established strong employee satisfaction and person-centred HR which benefits people of all ages. Commitment to different styles of flexible working will be sustained.
UK09 Housing	Calico	Non-profit	Real estate activities (L68)	336	2, 3, 4, 6, 7	Yes, but not documented before Established 2000 Imported at that time many elements of local authority HR practice and has further developed this. Likely to retain case-by-case approach for all employees.
UK10 Council	Falkirk Council	Public	Local Authority (O84)	8,100	10 (but note, in particular, 6,7 and 9)	Yes, but not documented before Flexible retirement since 2005/06 Flexible working policy since 2001 Stepping up general health promotion since 2001

* Age management approaches:

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 approach

Annex 3: Pathways of Practice – Relationship to Case Studies

Path-way	DE	DK	FR	IT	NL	PL	SE	UK
1.		DK04 Care DK09 Care	FR04 Aerospace FR05 Waste	IT01 Care IT02 Hospital IT03 Social			SE01Automobile	
2.		DK03 Cement DK05 Construction	FR03 Automobiles				SE01 Automobile SE02 Manufacturing SE03 Banking	UK09 Housing
3.		DK03 Cement	FR01 Nuclear FR03 Automobiles	IT01 Care		PL05 Power	SE03 Banking	
4.			FR02 Insurance			PL06 Filters		
5.		DK01 IT						
6.		DK01 IT DK02 DIY	FR01 Nuclear			PL03 Bakery PL09 Kitchenware		
7.	DE01 Machinery	DK02 DIY	FR02 Insurance FR06 Care		NL01 Insurance			UK02 Recruitment UK03 Care UK06 Telecom UK07 Call Centre UK Council
8.		DK07 Hospital	FR01 Nuclear					
9.		DK08 Training	FR06 Hospital					
10.	DE06 Roofing DE02 Transport						SE04 IT Consultancy	
11.				IT03 Social	NL02 Education			

12.								UK01 Ballet UK04 Training UK05 School
13.	DE06 Roofing DE07 HVAC DE11 Steel Processing	“			NL05 Education		SE11 Logistics	UK01 Ballet
14.		“		IT 01 Care	NL04 Construction			UK02 Recruitment
15.	DE12 High-tech	“	FR06 Hospital				SE03 Banking SE05 Insurance SE06 Trade Union	UK10 Council
16.	DE04 Audio Equipment	“	FR06 Hospital	IT02 Hospital				UK05 School UK09 Housing
17.		“		IT04 Transport	NL07 Police	PL07 Cooperative A		UK01 Ballet UK04 Training UK07 Call Centre
18.		“					SE02 Manufacturing	
19.		“						
20.	DE01 Machinery DE10 HVAC	“	FR02 Insurance FR04 Aerospace		NL02 Education NL03 Telecom NL06 Ministry	PL04 Radio PL05 Power	SE01 Automobile	UK01 Ballet UK04 Training UK08 Retail UK09 Housing
21.	DE02 Transport DE06 Roofing DE08 Transport Equipment				NL01 Insurance NL05 Education NL06 Ministry		SE01 Automobile	

22.				IT01 Care	NL07 Police NL01 Insurance		SE01 Automobile	
23.					NL08 Chemical NL09 Chemical NL10 Transport			
24.	DE06 Roofing: DE07 HVAC				NL14 Construction			

Note: This table draws on the 83 good practice cases. As explained in Chapter 2, a given case study may exhibit behaviour that can exemplify a pathway or present a more complex picture via its experience of more than one pathway in sequence or simultaneously, at least in part. Hence several cases studies appear under more than one pathway. This table is at a development stage and the pathways may be re-defined to make them more useful for analysis.