



RESEARCH PAPER

No 44

Increasing the value of age

Guidance in employers' age
management strategies





Increasing the value of age

Guidance in employers' age
management strategies

Please site this publication as:

Cedefop (2015). *Increasing the value of age: guidance in employers' age management strategies*. Luxembourg: Publications Office of the European Union. Cedefop research paper; No 44

A great deal of additional information on the European Union is available on the Internet.

It can be accessed through the Europa server (<http://europa.eu>).

Luxembourg: Publications Office of the European Union, 2015

ISBN 978-92-896-1640-9

ISSN 1831-5860

doi: 10.2801/7932

© European Centre for the Development of Vocational Training (Cedefop), 2015
All rights reserved.

The **European Centre for the Development of Vocational Training** (Cedefop) is the European Union's reference centre for vocational education and training. We provide information on and analyses of vocational education and training systems, policies, research and practice. Cedefop was established in 1975 by Council Regulation (EEC) No 337/75.

Europe 123, 570 01 Thessaloniki (Pylea), GREECE
PO Box 22427, 551 02 Thessaloniki, GREECE
Tel. +30 2310490111, Fax +30 2310490020
E-mail: info@cedefop.europa.eu
www.cedefop.europa.eu

Joachim James Calleja, *Director*
Barbara Dorn, *Chair of the Governing Board*

Foreword

Due to falling fertility rates since the 1960s, Europe's population is ageing, with growing impact on its labour force. In consequence, many European States have raised pension age and designed incentives for people to stay longer in employment.

This results in a steady increase of participation among older workers and a change in attitude towards retirement. The 2012 Eurobarometer survey on active ageing highlights that 'one third of Europeans [...] would like to continue working after they reach retirement age, and the idea of combining a part-time job and a partial pension is a more appealing prospect than full retirement to almost two thirds of Europeans' (European Commission, 2012b, p. 1).

Increasing employment of older adults requires European States to support their citizens to enjoy longer fulfilling careers. Ageing individuals face specific career development challenges such as growing health limitations, skills obsolescence, and changing personal priorities. At the same time, they have enormous value for organisations and the economy, due to their accumulated experience, skills and knowledge.

While age management strategies are increasing everywhere in organisations and firms across Europe, they are not necessarily supported by consistent policies and systems; and most still fail to exploit fully the potential of guidance.

Guidance activities specifically help older workers to reflect about their professional experiences and assess their skills, needs and expectations. They support informed decisions on further training, retraining and development of key skills. Guidance can also help reflect about possible scenarios for part-time work, redeployment in new functions in organisations or the development of entirely new activities. It can assist older workers in planning their mature career stages and exit strategies in a structured, informed way, increasing their motivation and productive contribution.

Guidance also supports firms in fully harnessing the potential of their human resources, not only via the assessment of skills and knowledge, but also by enabling better allocation of available resources and the transmission of knowledge between generations of workers. It is a useful complement to validation procedures and the planning of training. When implemented in a lifelong perspective, guidance allows for even more effective age management strategies, with smooth integration in internal processes and covering all of an enterprise's staff.

This Cedefop report draws attention to the mutual benefits to workers and organisations that arise when guidance is integrated in age management strategies. It offers insights on how to develop guidance activities at the workplace.

I trust this report will inspire actions and help Member States develop institutional frameworks and incentives to help enterprises develop age management and guidance strategies.

Joachim James Calleja
Director of Cedefop

Acknowledgements

This report reflects Cedefop efforts to raise awareness of the role that guidance plays in age management strategies in enterprises. It is the result of team work: particular mention should be made of Cedefop expert Pedro Moreno da Fonseca who supervised the study and of Bert-Jan Buiskool, Paul Vronhoof and Michel Winnubst of Panteia who undertook the research and drafted the report (*).

Thanks go to former Cedefop experts Mika Launikari, who initiated the project, and Angela Musca for the initial work done on the study. Jasper Van-Loo, Eleonore Schmid and Antje Barabasch contributed to the finalisation of the report.

Cedefop would like to thank Raimo Vuorinen, coordinator of the European Lifelong Guidance Policy Network (ELGPN) and all participating national representatives for providing information, working on case studies and participating in the interviews.

Thanks are extended to many contributors who supported and informed this study, through interviews and documentation: Nanna Steenbjerg Kolze, Imbi Ernits- Kaljuste, Pille Liimal, Maiken Sörg, Harri Taliga, Lana Randaru, Ave Szymanel, Piret Puss, Nina Ahlroos, Jan Lindblom, Bernhard Jenschke, Christiane Voß-Gundlach, Peter van Deursen, Zjev van Dun, Marjolein Hins, Stephen McNair, Carolynne Arfield, Richard Veleta, Irena Mazek, Marzena Ciecierska, Magda Zupančič, Anne Eydoux, Marcella Corsi, Mar Calleja Villa. Thanks also go to the participants of Cedefop's workshop on guidance in employers' age management strategies held in December 2012.

(*) Work was carried out under Cedefop service contract
2012-004/AO/ECVL/MILA/Guidance-in-age-management-strategies/019/11.

Table of contents

| | |
|---|----|
| Foreword..... | 1 |
| Acknowledgements | 3 |
| List of figures, tables and boxes | 7 |
| Executive summary | 8 |
| 1. Introduction to the study | 12 |
| 1.1. Active age management: changing paradigms | 12 |
| 1.2. Active age management in policy | 12 |
| 1.3. Steeply increasing participation rates | 14 |
| 1.4. Challenges to overcome for older workers..... | 15 |
| 1.5. The role of guidance in active ageing | 17 |
| 2. Research questions, concept and methods | 20 |
| 2.1. Objectives and research questions..... | 20 |
| 2.2. Three-level approach..... | 20 |
| 2.2.1. Assessment at system level | 21 |
| 2.2.2. Assessment at organisation level..... | 21 |
| 2.2.3. Guidance activities in active age management..... | 22 |
| 2.2.4. Defining older workers | 24 |
| 2.3. Study methodology..... | 27 |
| 3. European statistics on older workers and enterprise policies..... | 28 |
| 3.1. Introduction | 28 |
| 3.2. Background characteristics of older workers | 28 |
| 3.2.1. The share of older workers is growing in Europe..... | 28 |
| 3.2.2. Older workers have lower employment participation | 29 |
| 3.2.3. The relative share of older workers differs across sectors | 31 |
| 3.2.4. Older workers overrepresented in SMEs..... | 31 |
| 3.2.5. The exit age of older workers is increasing | 32 |
| 3.2.6. Older people participate less in learning..... | 33 |
| 3.3. Active age management in organisations | 35 |
| 3.3.1. Few recruitment or retention strategies for older workers | 35 |
| 3.3.2. Older worker have different working conditions | 36 |
| 3.3.3. SMEs provide fewer training opportunities for older workers | 38 |

| | | |
|--------|---|----|
| 3.3.4. | Validation of non-formal and informal learning within enterprises | 39 |
| 3.3.5. | Examples from countries studied | 40 |
| 3.4. | Conclusions..... | 42 |
| 4. | System level approaches on guidance for active age management..... | 44 |
| 4.1. | Introduction | 44 |
| 4.2. | Policy perspectives on the role of older workers | 44 |
| 4.2.1. | Country responses and perspectives | 44 |
| 4.3. | Coordination of active ageing and guidance | 48 |
| 4.3.1. | Institutional steps towards longer working lives | 48 |
| 4.3.2. | National strategies and types of stakeholder engagement..... | 51 |
| 4.3.3. | The growth of validation: valuing the experience of workers | 54 |
| 4.4. | Access to guidance for older workers | 56 |
| 4.5. | Assuring guidance provision quality..... | 59 |
| 4.6. | Career management skills and active ageing | 62 |
| 4.7. | Conclusions..... | 64 |
| 5. | Age management guidance at work | 66 |
| 5.1. | Introduction | 66 |
| 5.2. | Strategy and approach | 66 |
| 5.2.1. | Starting with strategy..... | 66 |
| 5.2.2. | From strategy to approach | 71 |
| 5.2.3. | Embedding in an overall human resources strategy | 75 |
| 5.3. | Including guidance | 75 |
| 5.3.1. | Guidance for older workers and others | 75 |
| 5.3.2. | Guidance activities..... | 76 |
| 5.4. | Actors involved | 79 |
| 5.4.1. | Guidance providers..... | 79 |
| 5.4.2. | Governance partners | 81 |
| 5.4.3. | Resource partners | 81 |
| 5.5. | Concluding | 82 |
| 6. | Age management guidance delivery | 84 |
| 6.1. | Introduction | 84 |
| 6.2. | Start-up stage..... | 84 |
| 6.2.1. | Who participates in the start-up stage? | 84 |
| 6.2.2. | The start-up stage of guidance..... | 86 |
| 6.3. | Guidance delivery..... | 88 |
| 6.3.1. | Who participates in the delivery stage? | 88 |

| | |
|--|-----|
| 6.3.2. What is done during the delivery stage? | 90 |
| 6.4. Conclusions..... | 95 |
| 7. Outcomes from age management guidance | 97 |
| 7.1. Introduction | 97 |
| 7.2. Outcomes, results and impact | 97 |
| 7.3. Key elements for success..... | 103 |
| 7.4. EU policy priorities and the case-studies | 105 |
| 7.5. Conclusions..... | 107 |
| 8. Challenges and key messages..... | 108 |
| 8.1. Main challenges identified | 108 |
| 8.2. From challenge to key messages | 113 |
| List of abbreviations | 117 |
| References..... | 118 |

List of figures, tables and boxes

Figures

| | |
|--|----|
| 1. Levels of the conceptual model | 22 |
| 2. Employment rate, age group 55 to 64, in 2011 and growth over 2000-12 (%) | 29 |
| 3. Employment rate of male and female working population aged 55 to 64 (2012) | 30 |
| 4. Share of adults participating in education and training by specific cohorts in 2011 | 33 |
| 5. Reasons for non-participation in learning..... | 34 |
| 6. Recruitment and retention of older workers in companies | 36 |
| 7. Percentage of companies assessing the need for further training for different target groups (in small, medium, and large organisations) | 37 |
| 8. Percentage of companies assessing training needs of older workers | 38 |
| 9. Total overview of the effects | 99 |

Tables

| | |
|---|----|
| 1. Overview of challenges to keeping older workers employed..... | 16 |
| 2. List of guidance activities..... | 25 |
| 3. Employees by age groups per sector (EU-27, 2012, including percentage of older employees in the total working population)..... | 31 |
| 4. Overview of active age management policies in 12 EU Member States..... | 47 |
| 5. Background and aim of the case studies | 67 |
| 6. Implemented approaches per case..... | 73 |
| 7. Presence of guidance activities in cases | 76 |
| 8. Presence of external actors in the case studies..... | 80 |
| 9. Presence of external actors in cases | 85 |
| 10. Relation required involvement and obligation nature | 89 |
| 11. Presence of quality indicators in cases | 92 |
| 12. Frequently reported outcomes, results and impact | 98 |

Box

| | |
|-------------------------------------|----|
| 1. Definition of older people | 26 |
|-------------------------------------|----|

Executive summary

This report reviews practices in employers' age management strategies and the role of guidance therein. Several challenges and messages for policy and practices are identified.

Age management strategies: critical but neglected

Age management strategies are critical to aims to increase retirement age while ensuring longer and fulfilling working life for individuals. Despite many good practices and examples, age management is generally not embedded in human resource policies in organisations, nor supported by national policies and institutions.

The concept of age management is relatively new and there are few national policies or mandatory guidelines for active age management at the workplace, except in France. In most countries, active age management is mainly stimulated through financial incentives, aimed either at employers or employees. Laws and regulations can, however, stimulate the development of age management strategies that would otherwise be overlooked by organisations (as occurs in France).

Guidance not formally integrated in strategies

Even where active age management policies were developed over the past decade, guidance is usually not formally included. Older workers are not a typical target group for national guidance strategies, which tend to be focused on young people and the unemployed. There is, however, a trend towards opening up guidance to the employed, making use ICT and so allowing older workers access to such services.

Previous research on career guidance at the workplace has already shown that there are no clear processes for career advice and guidance in firms and organisations. Where guidance exists it tends to be addressed to management staff and young recruits, while most other employees, including older workers, are expected to take responsibility for their own career development.

Nevertheless, the study carried out by Cedefop helped identify a number of examples of practices, reviewed in this report.

Keeping workers productive and retaining expertise

Keeping older workers productive is the most important reason why organisations decide to implement an age management strategy; they are also keen to retain the knowledge and expertise held by older workers. Therefore, age management strategies tend to be problem-oriented, aiming to address a specific challenge, such as health problems, negative stereotypes, skills obsolescence, or retaining workers' expertise. This introduces a normative element in age management and strongly influences practices.

Most age management strategies include training, learning and mentoring, and career development reviews. In terms of guidance, the most common methods are signposting and informing. Advising is less often available because many age management strategies rely on the provision of information to employees, who are then to take responsibility for the next steps.

Weak focus on guidance quality

In most cases, guidance is provided by internal staff such as managers or direct supervisors. Providing guidance is seen as a management task and is part of appraisals, career development reviews or informal on-the-job coaching and advising. External actors, such as guidance and counselling experts and training institutes, tend to be involved ad hoc, mostly when launching the age management strategy.

Limited attention is paid to the specific skills of internal staff providing guidance: managers and supervisors are supposed to have the right skills to offer guidance and additional training is not considered necessary. Nevertheless, when training is provided it appears to contribute to improving guidance quality

There is no explicit attention given to the quality of the guidance in most cases, though quality may be indirectly fostered by involving external experts, protocols or guidelines or the identification of good practices.

Benefits for individuals, organisations and society

The cases studied show that age management strategies have a positive effect for the individual: their job satisfaction and self-confidence increase and they stay longer in their jobs. Employees gain and transfer knowledge and skills for their own benefit and for the organisation.

Organisations usually achieve their specific goals but there are also positive overspill effects. Better cooperation between generations tends to increase

productivity and generate innovative insights and products. Organisations see their productive innovative capacity increase.

At national level, age management strategies contribute to the reduction of the costs of unemployment and inactivity, because (redundant) older employees are better equipped for a new job. When strategies encourage cooperation between stakeholders, for example between firms and schools, this positively affects the local labour market. Both organisations learn from each other, which leads to a better match between the skills taught at school and those needed at work.

However, achieving positive accounts requires meeting certain conditions:

- (a) age management strategies require time and money. If these are insufficient, efforts are not sustained;
- (b) age management must be integrated in and/or complement other organisation policies, such as human resources policy or collective labour agreements, and in normal work processes (such as appraisal or career development reviews);
- (c) trust is important. If one of the parties does not feel that the strategy is sincere or a hidden agenda is present, it might fail;
- (d) the implementation of the age management strategy requires appropriate expertise.

Key lessons

Developing framework and institutional conditions for age management strategies to flourish:

- (a) guidance provision is still fragmented, in policy and in actors involved. An overall framework is needed to stimulate the development of a coherent system assuring access, quality, and cooperation and encourage the evolution of career development, also focusing on the needs of older workers;
- (b) better coordination must be achieved: between age management strategies at national and sector level; between enterprises and external stakeholders; between guidance providers to streamline their guidance provision for employed older workers;
- (c) a case for career guidance for employed older workers must be made and communicated more effectively. Employers' awareness of age management strategies needs to increase, including the full range of possibilities offered by guidance activities.

Best practices in organisations should be stimulated:

- (a) a lifelong approach needs to be promoted, aiming at preventive age management for workers of all age groups and guidance embedded in organisation work processes;
- (b) quality of provision must be stepped up: those providing guidance need to be trained; practitioner toolkits could offer guidelines on different guidance tools and methodologies;
- (c) more attention needs to be paid to developing career management skills (CMS) on top of the focus on job-specific skills;
- (d) an evidence base should be created to support continuing efforts and show the positive effects on organisations and people;
- (e) older worker needs to be empowered by demand side funding instruments (such as guidance vouchers) so they can decide themselves which offer to take.

CHAPTER 1.

Introduction to the study

1.1. Active age management: changing paradigms

EU Member States policies have, for a long time, actively contributed to a reduction in the contribution of older workers. Governments and their social partners developed a mutual interest in promoting early retirement as a general remedy, against the backdrop of the 1973 oil crisis coupled with the decline of several economic industries, an increase in unemployment and excess supply of younger workers since the mid-1970s.

Measurements such as preretirement in Denmark and Germany and the early retirement and job release schemes in the Netherlands and the UK actively encouraged early exit from the labour force. Employment of older people has also been negatively affected by the imposition of a uniform mandatory age of retirement in several countries (Avramov and Maskova, 2003).

These policies have significantly contributed to the steady reduction in labour participation by older workers (aged 55-64) since the 1970s. After two decades participation stabilised at the all-time low of about 37% in the early 1990s ⁽¹⁾ and remained at this level between 1992 and 2000. This has been labelled the age/employment paradox: while life expectancy in the EU has increased significantly since the 1950s, labour force participation by older people has dropped dramatically (Walker, 2001).

A change in policy began to take shape from the early-1990s onwards, partially due to rising social security costs, a foreseen increase in population ageing, and future shortages in labour and skills. It also became generally recognised that the early retirement schemes proved ineffective and very costly for society (Walker, 2001; Davey, 2002; Avramov and Maskova, 2003).

1.2. Active age management in policy

Countries developed policies to increase the participation of older workers by:

- (a) increasing the pension age, limiting preretirement incentives;

⁽¹⁾ Walker, 2001; von Nordheim, 2003; Avramov and Maskova, 2003. See also Eurostat database on employment rate of older workers by sex (online data code tsiem020) http://epp.eurostat.ec.europa.eu/portal/page/portal/statistics/search_database

- (b) developing anti-age discrimination legislation;
- (c) providing subsidies to employers to keep older workers employed;
- (d) providing subsidies to assist the re-return of older workers to the organisation;
- (e) establishing incentives for lifelong learning and skills development in the workplace;
- (f) developing awareness raising campaigns aiming at an attitude change in companies towards older workers;
- (g) creating government-sponsored 'age management best practice' company prizes.

These national developments were accompanied by a wide range of documents published since 2000, starting with the communication *Towards a Europe for all ages* (European Commission, 1999), which identified higher employment of older people as pivotal for a successful policy response to the challenges posed by population ageing. There were also follow-up conferences.

However, the Lisbon Strategy in March 2000 indicated insufficient participation of older workers on the labour market as one of the main weaknesses of the Union and set the ambitious aim of achieving an employment rate of 70% by 2010.

The importance of encouraging increased participation of older workers was confirmed at subsequent European Council meetings from December 2000 until March 2002 (European Council, 2000; 2001a; 2001b; 2001c; 2002). Since the European Council meeting of March 2002 in Barcelona, there has been continued emphasis on active ageing and raising the labour participation of older workers ⁽²⁾ ⁽³⁾.

In March 2010 the European Council adopted the Europe 2020 Strategy in which the European Commission points to increased ageing and low employment – especially of older workers – as two of Europe's main structural weaknesses. The Commission proposed a target for 75% overall employment rate in 2020.

The target specifically needs greater involvement of older workers ⁽⁴⁾ and for Member States to promote new forms of work-life balance and active ageing

⁽²⁾ European Council, 2003; 2005; European Commission, 2005a; 2005b; 2006b; 2009.

⁽³⁾ Council decision on guidelines for the employment policies of the Member States (Council of the European Union, 2005). The same guidelines were adopted for 2008-10 by the Council decision of March 2008 (Council of the European Union, 2008a).

⁽⁴⁾ The Commission equally stresses the importance of the progressive inclusion of women and immigrants on the labour market.

policies within the framework of the initiative *An agenda for new skills and jobs* (European Commission, 2010a).

The adoption of Europe 2020 was followed by the adoption of *Council conclusions on active ageing* in June the same year (Council of the European Union, 2010). In the document, the Council calls on the Member States and the Commission to make progress on 19 specific points.

The most important actions relevant to active age management are 'to encourage companies to introduce age management strategies [...]; to raise the employment rates of older workers by improving working conditions, investing in life-long learning, and removing employment obstacles including those linked to discrimination [...]; to promote access of older persons to education and information and communication technologies [...; and] to develop common principles for active ageing' (Council of the European Union, 2010, pp. 6-7).

The *Bruges communiqué* states that 'by 2020, European VET systems should be more attractive, relevant, career-oriented, innovative, accessible and flexible than in 2010'. Also, European VET 'should contribute to excellence and equity in lifelong learning by providing [...] easily accessible and high-quality lifelong information, guidance and counselling services' (Council of the European Union; European Commission, 2010, p. 6).

In 2010 and 2012 the EU also paid increased attention to pension reform (European Commission, 2010c). The white paper *An agenda for adequate, safe and sustainable pensions*, stresses the need to reform pension systems and to raise the labour market participation of women and older workers to ensure that pensions continue to be both sustainable and adequate (European Commission, 2012c).

1.3. Steeply increasing participation rates

Due to the increasing focus on active ageing, labour market participation has increased in all Member States over the past 10 years, although several differences still appear between countries. Some have high labour market participation ⁽⁵⁾ and employment rates above 55% for people in the age group 55 to 65, as in Denmark, Germany, Cyprus, Finland and in the UK, including; in others, such as Hungary, Malta and Slovenia, the rate has remained low, at 35% or lower.

⁽⁵⁾ Eurostat, labour force survey.

There is also a difference in the number (and percentage) of older employees in the different sectors within the EU. In manufacturing and in accommodation and food services, the percentage of older employees is relatively low.

In education and real estate activities the percentage of older employees is relatively high. 'Although the typical pensionable age is 65 years, the average exit age from the labour force in 2009 was about 61.5 years [and this will steadily increase over the years], 42% of Europeans believe that they will be capable of doing the work they are currently doing beyond the age of 65, while 17% expect that they will not be able to carry on in their current job until they are 60. One third of Europeans say that they would like to continue working after they reach retirement age, and the idea of combining a part-time job and a partial pension is more appealing than full retirement to almost two thirds of Europeans' (European Commission, 2012b, p.1; see also Lissenburgh and Smeaton, 2003; Smeaton et al., 2009).

1.4. Challenges to overcome for older workers

Despite the growing policy attention on active ageing and the increasing participation figures across countries, older workers still face challenges that hamper remaining employed longer or, conversely, stimulate early retirement. These challenges can be classified into three categories:

- (a) institutional challenges (related to the system level);
- (b) situational challenges (related to the organisation level);
- (c) dispositional challenges (related to the individual level) (based on Cross, 1981, among others).

The challenges at these three levels consist of an intertwined set of barriers, affecting each other at all three levels, as described in Table 1.

Systemic challenges are those practices and procedures that exclude or discourage older workers from remaining employed longer. Institutional barriers are found within the system itself and are often structural in nature.

Table 1. **Overview of challenges to keeping older workers employed**

| Systemic barriers | Situational barriers | Dispositional barriers |
|---|--|--|
| Eligible pension age | Social attitudes in the workplace and expectations towards older workers | The generally negative image of older workers could form a self-fulfilling prophecy. ^(a) |
| Legislation and tax/benefit structures, for example with regard to early retirement | Lack of age aware human resource policies and guidance activities | Loss of confidence and self-esteem and unwillingness to learn or tiredness ^(b) ^(c) |
| Lack of access to active labour market services after retirement age. | Companies' cost-benefit analyses of investments in training older workers ^(a) | Lack of vocational qualifications and practical skills (outdated skills) ^(d) |
| The economic situation and demographic developments | Family circumstances (caring responsibilities for senior family members) ^(d) | Internal urges to exchange work for leisure or a life away from formal work (voluntary) |
| Society's view/perception/prejudices towards older workers | Working conditions and work structures which do not directly support further learning ^(c) | The ability to manage and cope with change in later life ^(a) |
| Lack of incentive for companies to deploy active age management policies | Changing and emerging career development models and flexibilisation of the labour market | Lack of understanding of how the labour market operates ^(e) |
| Lack of guidance and lifelong learning opportunities | Older workers' competences concentrate increasingly on a specialised field of work ^(c) | Financial situation of older workers (driver as well as hampering factor) |
| | Opportunities to keep up to date with technological changes, lack of information, reduced social networks ^(b) | Physical and mental health problems ^(c) |

Source: Panteia, based on several sources:

^(a) Cedefop (2011c);

^(b) European Commission and Committee of the Regions of the EU (2011);

^(c) Cedefop (2010);

^(d) Cedefop (2011a);

^(e) Cedefop (2008a).

A 2012 Eurobarometer survey shows that 'lack of opportunities to retire gradually, exclusion from training and negative perceptions of older people among employees are perceived to be the main obstacles stopping people aged 55 years and over from working. Employees aged 55 years and over are perceived to be experienced and reliable, but less likely to be seen as being open to new ideas or up to date with new technology' (European Commission, 2012b, p. 8).

It is useful to see whether demographically determined trends in labour supply create a market conjuncture more conducive to the employment of older workers. The demand for older workers might automatically increase and

employment opportunities develop as younger workers become scarce. Further, generous financial security (high pre-pension for example) will make it more attractive to stop working at an earlier age, pulling people out of employment.

Situational challenges, arising from one's situation or environment at a given point, relate to a person's life context, including the social, organisational and physical surroundings. Empirical research shows that human resources managers, executives and colleagues regard older employees as being less adaptable to new technologies (Cedefop, 2010).

'Prejudices about older workers remain a powerful barrier; employers continue to suspect that [for older workers] being unemployed indicates incompetence or lack of motivation' (Cedefop, 2011c, p. 133). The 2012 Eurobarometer survey on active ageing confirms this picture and concludes that 'workplace age discrimination is the most widespread form of age discrimination with one in five citizens having personally experienced or witnessed it. [...] More respondents in the 12 new Member States compared to the 15 old Member States say they have personally been discriminated against (15% versus 12%) and have witnessed it (32% versus 25%)' (European Commission, 2012a, p. 7).

Dispositional challenges are those related to attitudes, self-perceptions and individual characteristics. 'A particular challenge for guidance professionals is to help people acquire the detailed labour market knowledge, career management skills [and confidence] that they require (Cedefop, 2008a, p. 114).

The barriers are diverse and cannot be reduced to a single factor; in many cases distinctions between the systematic, situational and individual barriers are not easy to make. Nevertheless, the distinction appears to provide a useful classification to address differences in types of barriers individuals face and different types of outreach strategies providers-/policy-makers can, and should, use to mitigate these barriers and to increase participation of older workers.

1.5. The role of guidance in active ageing

Increasing the age of entitlement to pensions should coincide with policies that enable people to have better-quality working lives and be more productive up to the existing pension age (Maltby, 2011).

The provision of career guidance to older workers could play an important role in helping to overcome a number of the situational and dispositional challenges that older workers face. For example, career guidance for older workers could help individuals overcome low self-confidence, (self and hetero) stereotyping, barriers to work and learning, barriers to making career changes, and to find affordable training opportunities (Ford, 2007).

Further to its potential function in removing situational and dispositional barriers, guidance can stimulate and support the development of the full potential of persons as workers (and in other aspects of life) in all stages of their careers. For older workers, guidance can help them enhance their productive contribution to organisations and society as well as enable successful and more profound transmission of knowledge, skills and values between workers of different generations ⁽⁶⁾.

In 2008 the Council adopted a resolution on better integrating lifelong guidance into lifelong learning strategies. In the resolution the Council identifies four priority areas: 'encourage the lifelong acquisition of career management skills; facilitate access by all citizens to guidance services; develop quality assurance in guidance provisions; encourage coordination and cooperation among the various national, regional and local stakeholders; [...] and] invites the Member States to strengthen the role of lifelong guidance in their national lifelong learning strategies' (Council of the European Union, 2008b, p. 5). The importance of high quality lifelong guidance has subsequently been stressed in the Education and Training 2020 strategic framework (Council of the European Union, 2009).

One of the key questions is how, on the one hand, guidance activities are embedded in active age management strategies at company level and, on the other hand, whether older workers are targeted within career guidance policies. This brings together two worlds often studied separately.

Research on active age management shows that policies are generally still not fully embedded in organisational human resources policies. Limited research is available on how guidance activities are embedded in an organisation's active age management strategies, although we know that many organisations deploy activities in the context of active ageing, that can be considered as (partly) guidance. Some common cases are yearly appraisal and development talks, self-help packages for older workers on the internet and intranet, formal and informal coaching and mentoring arrangements, and handbooks for older workers.

Research on career guidance in the workplace, done by Cedefop in 2008, shows that there are no clear processes for 'career advice and guidance in the workplace [...] although positive examples of good practice exist. Most support is targeted at key talent groups [such as management staff and young recruited employees] while most other employees [including older workers] are expected to take responsibility for their own career development' (Cedefop, 2008a, p. 31).

⁽⁶⁾ This process is described in literature as 'generativity'. See, for example, Clark and Arnold, 2008.

As indicated in this report, much of the career guidance is not delivered in a formalised way with clear structures, procedures, processes and qualified persons assigned providing it. 'Much career support is delivered informally by managers, work colleagues, family and friends' (Cedefop, 2008a, p. 31).

Especially in small and medium-sized enterprises (SMEs) career guidance 'is more likely to be informal and dependent on the enthusiasm/commitment of individual managers'. As a result, quality assurance of guidance activities tends to be unsystematic.

This report also concludes that coordination and cooperation among the various stakeholders (employers, labour unions, chambers of commerce, PES, VET institutions) in providing guidance is limited. In most countries, guidance provision is focused on young people (provided by initial education and training institutes) or the unemployed (provided by public employment services) and not on the employed, specifically not addressing employed older workers. Older workers could be suspicious of career guidance provided by employers, perceiving it as biased or incomplete, while employers feel that it encourages people to leave. Few organisations employ professionally qualified career counsellors (Cedefop, 2008a).

CHAPTER 2.

Research questions, concept and methods

2.1. Objectives and research questions

With current demographic and economic trends requiring extension of older workers' careers until statutory retirement age or even beyond, this Cedefop study is aimed at:

- (a) exploring the way the European Union (EU) and national policy and strategy frameworks address the ageing workforce across the EU-27. Specific focus is on ageing as a transversal element in policies and strategies linked to employment, education-training and social inclusion of older workers;
- (b) identifying good practices which reflect innovative approaches in designing, developing, implementing and monitoring age management strategies in public and private sector organisations, with guidance as an integral element. Such strategies should as a minimum have two specific features: promoting (lifelong) learning and career development opportunities in the work place; and offering flexible work practices to ageing staff members with a view to keeping them longer in employment;
- (c) delivering key messages for EU and national policy and decision-makers, for employers and for guidance experts, to support future policy and practice. The aim here is to strengthen the role of guidance in active age management strategies at national level as well as to support employers in setting up and implementing such strategies in workplaces across Europe.

2.2. Three-level approach

On a macro level, this study analyses how EU and national policies address the issues of staying long in employment and provides a framework for organisations to deploy guidance in age management strategies in the workplace.

On a meso level, it addresses how lifelong guidance – in its different activities and strategies – is embedded in employer's age management strategies supporting lifelong learning and skills development of older workers).

These levels form the analytical starting point of this study, studying each level separately but also in interaction with each other, to allow understanding of guidance effects and relevance at worker level (micro level) with particular emphasis on the group of older workers.

2.2.1. Assessment at system level

At system level, the national context of active age management policies has been assessed, along with the diversity of initiatives that have been developed (historical background, prevailing ideologies, and welfare regimes). Focus is given to the role of guidance in these policies, assessing whether guidance activities are well integrated or if they are considered a separate world.

To achieve this, political and legal frameworks were assessed, including broader active age management policies, legal arrangements for older workers and public sector approaches supporting active age management (policies and programmes) and the role of guidance in these policies.

Existing structures and the role of stakeholders were also assessed. This analysis considered the funding schemes, including government funding (local, regional, national), enterprise-funded initiatives, and European funding (such as the European Social Fund (ESF)). Outputs and results from national policies were also assessed.

System level analysis is viewed against the development of the European Council priorities for lifelong guidance policy in the specific context of active ageing (Council of the European Union, 2008b). This drives the analysis to investigate matters such as the level of access of older workers to career counselling services, the existence of national level strategies for the development of career management skills (CMS) for diverse age groups, or the level of concern that partners in active ageing programmes show in assessing the impact of guidance activities.

2.2.2. Assessment at organisation level

The organisation analysis also accounts for the contribution of guidance to value formation in the organisations, implying a value chain approach. As with other activities within organisations, guidance elements that will tend to generate greater value added are:

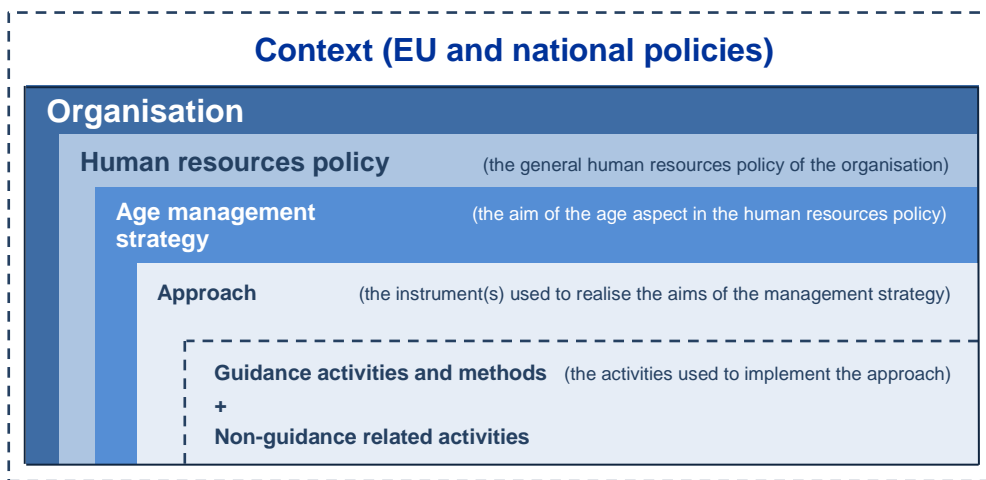
- (a) the quality of its inputs, such as the skills of the professionals involved, the adequacy of methods employed;
- (b) the organisation of its processes, strategies for worker engagement, level of formalisation of the approaches, ethical concerns, resource to distance guidance, external cooperation;
- (c) quality assurance of outputs, monitoring and assessment systems put into place.

An organisation has (or rather can have) an age management strategy in which every organisation aspect related to age plays a role. Whenever present, this age management strategy will be embedded in human resources policy.

An organisation age management strategy generally consists of one or more approaches, which correspond to overarching concepts. These approaches are then translated into more specific goals with associated activities and methods which should lead to predefined results. Within this context, guidance activities are used to implement the selected age management approach. Activities can be alternatives, building on each other or focusing on different aspects of an approach.

Guidance will include all activities, designed to help individuals to take educational, vocational or personal decisions during their working lives, supporting employees in fulfilling their work assignments irrespective of their age, allowing them contribute to the organisation's aims and processes in a significant way, adjusted to their career stage.

Figure 1. **Levels of the conceptual model**



Source: Panteia.

The age management strategy, approach and guidance activities all happen within an organisation and the environment of the organisation (the context, such as EU and national policies and developments). This results in the following conceptual model, as presented in Figure 1. The actual situation might not be as straightforward as this model suggests: it is merely a framework and introduces the relevant concepts for this study.

2.2.3. **Guidance activities in active age management**

Guidance defines itself as aid offered, in the form of activities, to an individual to allow him or her to define himself or herself. Guidance helps in identifying capacities, competences and interests. With this knowledge, an individual can make meaningful education, training and occupation decisions for their personal

life and work paths (before and after they enter the labour market) (Cedefop, 2005; 2008c).

Age management covers the various dimensions by which human resources are managed within organisations with an explicit focus on ageing and the overall management of the ageing workforce via public policy or collective bargaining (Walker and Eurofound, 1997).

Eurofound (2006) identified eight dimensions of age management, which can be seen as different approaches to reaching the goals of the (overall) age management strategy:

- (a) job recruitment ⁽⁷⁾;
- (b) training and lifelong learning ⁽⁸⁾;
- (c) career development;
- (d) flexible working time practices ⁽⁹⁾;
- (e) health protection and promotion, and workplace design ⁽¹⁰⁾;
- (f) redeployment;
- (g) employment exit and the transition to retirement ⁽¹¹⁾;
- (h) comprehensive approaches ⁽¹²⁾.

These eight dimensions do not only reflect purely functional aspects of activities, such as the matching of knowledge and skills to tasks, and recruitment procedures. They also impinge on development issues related to work-home balance, transmission of knowledge, and motivation.

Guidance, while incorporating models which match talents to jobs (Parsons, 1909; Williamson, 1939; Holland 1973, 1985), within a static and limited understanding of the individuals, also incorporates a holistic approach that reflects lifelong career paths. This approach clearly considers the various roles an individual plays all through his/her life and the change in their importance and meaning for the person as he/she becomes older (e.g. Super, 1980; 1990).

The first type of approach tends to privilege the use of testing as a preferential tool to assess skills, values or other characteristics, attempting to create informed correspondence with tasks and occupations. The second tends to privilege the promotion of reflexivity, frequently through face-to-face methods,

⁽⁷⁾ Walker and Eurofound, 1997, p. 3.

⁽⁸⁾ Walker and Eurofound, 1997, p. 4.

⁽⁹⁾ Walker and Eurofound, 1997, p. 5; Naegele and Walker, 2000, p. 8.

⁽¹⁰⁾ Naegele and Walker, 2000, p. 8.

⁽¹¹⁾ Naegele and Walker, 2000, p. 10.

⁽¹²⁾ Walker and Eurofound, 1997, p. 11.

such as interviewing, counselling and advising, with a certain depth, in which testing plays a secondary role. Narrative interviews are among some of the most popular methodologies in this later approach.

Guidance covers various activities for individuals (information, interviews, evaluation, counselling), groups (information, coordination, evaluation, counselling), and institutions (setting up workshops and procedures to aid guidance with teams of teachers or trainers, updating evaluation procedures which all actors in an institution must apply).

The principle that underlies these actions is that of developing individuals' autonomy. The aim of guidance is to allow the individual to make informed choices, respecting the individuality and the voluntary nature of guidance. Some of the most common guidance activities are listed in Table 2, with reference to aspects related to age management (Ford, 2007; Plant, 2008).

These activities can be combined in different ways to develop a specific age management approach. Validation of skills and qualifications, for example, makes extensive use of assessment methods and frequently attributes a complementary role to advising and counselling. Other approaches might rely on in-depth interviews within a stepwise counselling process aiming at personal clarification.

Table 2 will serve as a reference to guidance activities during the analysis of age management practices in organisations.

2.2.4. Defining older workers

While integrating a lifespan approach into the interpretation of the observed guidance practices, this study focuses especially on the older age group of workers and so demands a clear definition of 'older workers'. From the country reports it is apparent there is no single definition.

Already at this stage, the group of older workers is by no means homogeneous. The characteristics of older workers throughout Europe are very diverse and no homogeneous profile can be drawn up: they can live in towns or rural areas, in regions that face rapid economic change, they can have different levels of qualifications, they can be employed or unemployed, male or female, disabled or not. A person may even combine several potentially challenging aspects, as in the case of a low-qualified migrant, aged 57, living in a deprived area.

The differences in characteristics affect the challenges older workers face for active ageing. Although identified as one group, the barriers, and subsequently the measures to diminish the barriers, can be very different.

Table 2. List of guidance activities

| Name | Description |
|--------------------------|---|
| Signposting | information on guidance provision and outreach to older workers |
| Informing | information about career opportunities available, according to life stage and career path |
| Advising | helping individuals and groups to interpret information and choose the most appropriate option, regarding retraining, CMS development, redeployment options, among others |
| Counselling | working with individuals to help them discover, clarify, assess and understand their own experience, and to explore alternatives and their possible implementation |
| Mentoring | offering client-focused support: can work as intergenerational dynamic allowing for mutual development and exchange of knowledge among workers in different career and life stages |
| Assessing | helping individuals, by formal and informal means, to obtain a structured understanding of their personal, educational and vocational development: for experienced workers, assessment of their skills, needs and aspirations is a fundamental step in planning the mature career stage |
| Teaching and training | learner-centred experience to enable individuals to acquire knowledge, skills and competences, related to making career management, education, and career decisions and transitions: can refer both to technical and key skills, such as social interaction or ICT skills |
| Sampling | providing work experiences, work trials, learning tasters, and other opportunities for individuals to gain first-hand experience to assist and clarify decisions: for experienced workers it might open paths to redeployment in different functions from the ones performed |
| Enabling | supporting (groups of) older workers in dealing with organisations providing or influencing employment and learning opportunities |
| Advocating | negotiating directly with organisations on behalf of individuals or groups for whom there may be additional barriers to access; for example, older workers frequently need organised representation before their employees |
| Following up | keeping in touch with individuals after main guidance interventions |
| Networking | establishing links with a range of individuals and organisations, such as employment services, social security, civil associations, to support and enhance guidance provision |
| Feeding back | gathering information on the needs of individuals or groups and encouraging providers of opportunities to respond by adapting or developing provision for specific age groups |
| Managing | managing guidance activities in a coherent programme, with the necessary human and organisation resources, and evaluation |
| Innovation/system change | supporting developments and changes in origination and guidance practices to improve the quality and organisation of provision, better serving integrated career support along the life-span |

Source: Adapted from Ford (2007).

Box 1. Definition of older people

The Organisation for Economic Cooperation and Development (OECD) counts those as older employees, who are aged 50 and over: 'the age of 50 is not meant to be a watershed in and of itself in terms of defining who is old and who is not, but it does correspond to the age after which labour force participation rates begin to decline in many countries' (OECD, 2006, p. 16).

Another possibility is to regard the situational dimension of life and not only the chronological age of a person. Laslett (1991) divided the lifespan of a person into four parts and coined the term 'third age'. It describes a period in a life '[...] of personal achievement and fulfilment [...]'. The '[...] life career [...] has its culmination in the third age'. Laslett further differentiated the four ages: 'first comes an era of dependence, socialisation, immaturity and education; second an era of independence, maturity and responsibility, of earning and of saving, third an era of personal fulfilment; and fourth an era of final dependence, decrepitude and death' (Laslett, 1991).

For an individual, a situational definition is advantageous, as a person's health, mental abilities, work motivation, and activity vary greatly even among people of the same chronological age. Thus, 'older people' are not a homogeneous group, but include a wide range of behaviour types.

Our understanding of what we mean by being old is also culturally driven since perceptions on the definitions of young and old differ significantly across countries. The 2012 Eurobarometer survey on active ageing shows that in Malta, Portugal and Sweden, people under 37 years are considered young, while in Cyprus and Greece people are considered young up to the age of 50. On average, Europeans believe that we start being regarded as old just before 64 and are no longer considered young from the age of 41.8 years. Perceptions also vary with age and sex: women feel that old age begins slightly later than men (65.0 years versus 62.7 years respectively) (European Commission, 2012a).

Ford (2007) identifies the following subgroups of older people as the ones that most need career guidance:

- (a) people who have been made redundant having spent a long time working in a single organisation;
- (b) people who lack skills or self-confidence;
- (c) those who are trying the change career or return after a break, especially women;
- (d) those who are seeking more flexible working patterns, such as working on a part-time or flexible basis;
- (e) those who need to cope with other kinds of discrimination such as migrants and ethnic minorities;
- (f) those with health problems.

Older people can be defined in different ways and are a very heterogeneous group to deal with, even when the same definition is used. This study uses a

pragmatic definition based on chronological age: older people are between 55 and 64.

This definition responds to the age limits of the European Commission, which also considers a person as an 'older employee' when s/he exceeds the age of 55. It also allows a pan-European statistical overview on the size of this group and the challenges they are facing.

2.3. Study methodology

The study consists of the following four research steps:

- (a) analysis of existing literature;
- (b) mapping existing active age management strategies and practices in the Member States; focusing on the context, political and legal framework, funding and structures encouraging active age management in the workplace, and the role of guidance
- (c) conducting studies on age management practices in a selection of countries: 20 case studies in 12 selected countries, including 40 mini case studies in the other countries, through desk research, and interviews with stakeholders⁽¹³⁾;
- (d) conducting interviews with policy-/decision-makers on European level and other stakeholders.

⁽¹³⁾ The selected countries are the Czech Republic, Denmark, Germany, Estonia, Spain, France, Italy, the Netherlands, Poland, Slovenia, Sweden, the UK.

CHAPTER 3.

European statistics on older workers and enterprise policies

3.1. Introduction

Before focusing on national policies (Chapter 4) and current practices (Chapters 5, 6 and 7), this chapter, based on European statistics, first discusses the employment of older workers in Europe, their participation in lifelong learning, and the barriers they face. It also addresses European figures on active age management and specific policies for older workers in European enterprises.

3.2. Background characteristics of older workers

3.2.1. The share of older workers is growing in Europe

The population of Europe is changing; the average age is inclining and so the age of the working population is changing. Older employees are becoming a larger part of the (potential) working population, and the baby boom generation will reach the pension age the coming years. Older people represent an important part of the total as well as the working population in Europe.

Middle and older-aged adults (45-64 years) represent 25% of the total and almost 40% of the working population in the EU-27 Member States. Many EU-27 Member States have working populations with shares over 45 years old nearly up to 40% (Bulgaria, Denmark, Germany, Estonia, Latvia, Lithuania, Portugal, Finland, Sweden and the UK). Malta is the country with the lowest share of older-aged adults in its working population (33%).

While the shares of individuals belonging to different cohorts of older workers (45-54 and 55-64) in the total population are more or less similar (although slightly decreasing with rising age), most older workers in the average Member States belong to the 45 to 54 (14% of total population) and 54 to 64 cohorts (13% of total population).

In all countries except Germany, Finland and Sweden, where the share is slightly higher (around 20%), the 55 to 64 cohort amounts to roughly 10 to 15% of the working population; this means relatively few young people in the working population. All of these developments will have an effect on the labour market

and will probably result in labour shortages in the future. The labour market and the employee of the future are likely to be different from what they are now ⁽¹⁴⁾.

3.2.2. Older workers have lower employment participation

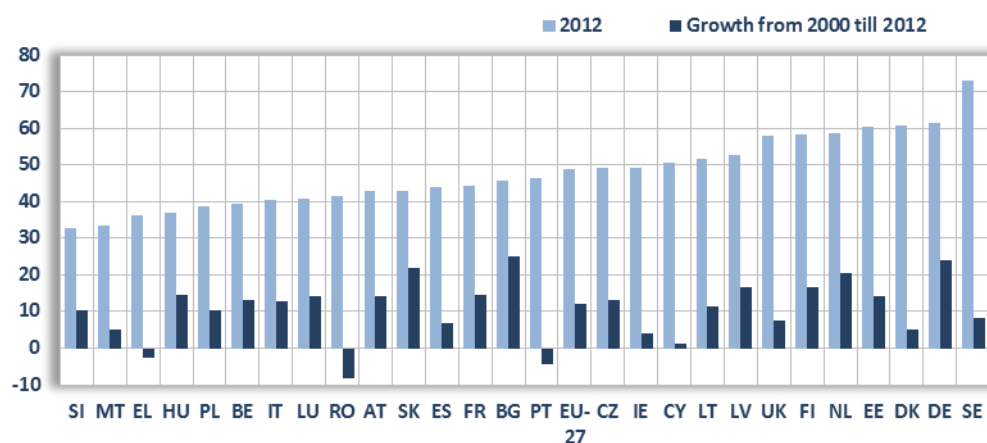
The Lisbon European Council of 2000 and the Stockholm European Council of 2001 agreed new strategic goals for strengthening employment, economic reform and social cohesion in a knowledge-based economy. This position was reinforced by the EU 2020 strategy.

One of the principal goals in the strategy is to reach, by 2020, overall employment of 75%, with an average employment rate for older people aged 55 to 64 of 50%.

In progress towards these targets there are significant differences between countries in the employment of people in the age group 55 to 65 (Figure 2).

In Denmark, Germany, Estonia, the Netherlands, Finland, Sweden and the UK the employment rate of older people is above 55%; Sweden outperforms other countries with 73%. This is mostly due to much higher employment rates among women than in the EU on average (69% compared to 40%). In Belgium, Greece, Hungary, Malta, Poland and Slovenia the employment rate is 40% or lower.

Figure 2. **Employment rate, age group 55 to 64, in 2011 and growth over 2000-12 (%)**



Source: Eurostat, 2011, labour force survey (online data code: lfsi_emp_a).

From 2000 to 2011 most countries show increasing employment of older workers (12% higher compared to 2000 for EU-27). Bulgaria, Germany, the

⁽¹⁴⁾ This information is based on Eurostat's labour force survey (reference year 2011).

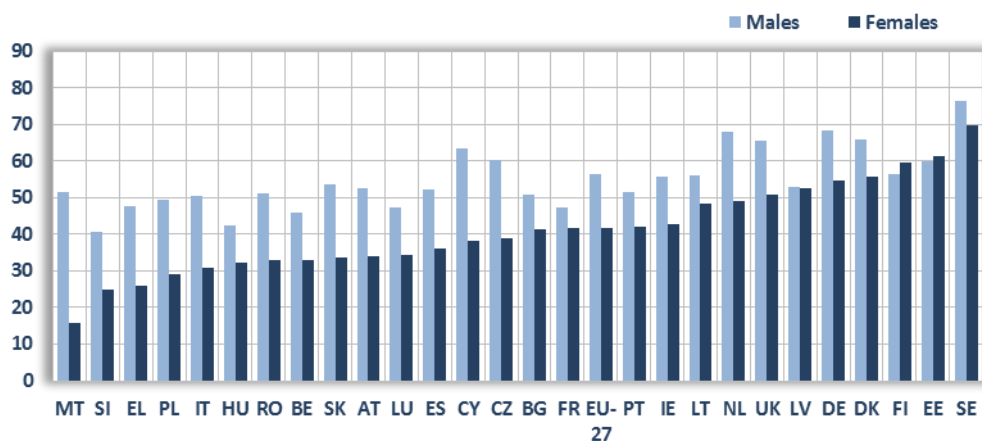
Netherlands and Slovakia report the highest growth in employment, while Greece, Romania and Portugal, report negative growth in the employment level of this age group.

A recent Eurofound study on the impact of the recession on age management policies shows that employment rates of older workers were much more resistant to the consequences of the crisis than those of younger or core-age workers (Eurofound, 2012a). In several of the countries covered, employment rates for those aged 60 to 64 are higher in 2011 than they were pre-crisis in 2008 (Austria, Belgium, Hungary, the Netherlands and Sweden).

Cross-country variation in employment is greater in the immediate pre-retirement age cohort (60-64 years) and the data generally show strong cross-country differences in the rate at which workers from the age of 55 onwards withdraw from employment.

In most countries, lower employment rates for older workers are a legacy of a policy in which early retirement was embraced as a way to generate labour market adjustment. For instance, in the Czech Republic over 80% of those aged 50 to 54 are in employment, while the corresponding figure falls to 25% for those aged 60 to 64.

Figure 3. **Employment rate of male and female working population aged 55 to 64 (2012)**



Source: Eurostat labour force survey, employment rate by sex, age and nationality (online data code lfsa_ergan).

There are strong gender differences in employment among the older working population, except for Estonia, Latvia, Finland and Sweden which show more equal distribution among male and female working populations. The high participation of the female working population in these countries also largely explains the high overall employment figures in these countries.

3.2.3. The relative share of older workers differs across sectors

There is also a difference in the number (and percentage) of older employees in different sectors within the EU (Table 3). In manufacturing and in accommodation and food services the percentage of older employees is relatively low. In education sector and in real estate activities the percentage of older employees is relatively high.

Table 3. **Employees by age groups per sector (EU-27, 2012, including percentage of older employees in the total working population)**

| | Number (* 1 000) | | % |
|--|------------------|--------|-------|
| | 15-64 | 55-64 | 55-64 |
| Accommodation and food service activities | 9 539 | 953 | 10 |
| Activities of extraterritorial organisations and bodies | 188 | 34 | 18 |
| Activities of households as employers | 2 600 | 492 | 19 |
| Administrative and support service activities | 8 547 | 1 215 | 14 |
| Agriculture, forestry and fishing | 9 676 | 2 137 | 22 |
| Arts, entertainment and recreation | 3 402 | 490 | 14 |
| Construction | 15 261 | 1 994 | 13 |
| Education | 15 760 | 2 934 | 19 |
| Electricity, gas, steam and air conditioning supply | 1 653 | 259 | 16 |
| Financial and insurance activities | 6 440 | 808 | 13 |
| Human health and social work activities | 22 502 | 3 745 | 17 |
| Information and communication | 6 304 | 562 | 9 |
| Manufacturing | 33 333 | 4 420 | 13 |
| Mining and quarrying | 834 | 108 | 13 |
| Other service activities | 5 068 | 748 | 15 |
| Professional, scientific and technical activities | 10 640 | 1 420 | 13 |
| Public administration and defence; compulsory social security | 14 928 | 2 549 | 17 |
| Real estate activities | 1 666 | 334 | 20 |
| Transportation and storage | 10 770 | 1 627 | 15 |
| Water supply; sewerage, waste management and remediation activities | 1 646 | 251 | 15 |
| Wholesale and retail trade; repair of motor vehicles and motorcycles | 29 619 | 3 426 | 12 |
| Unknown | 1 265 | 167 | 13 |
| EU-27 | 211 641 | 30 671 | 14 |

Source: Eurostat, 2012b.

3.2.4. Older workers overrepresented in SMEs

Differences can be seen in the age composition of different size classes of enterprises. A recent European Commission study on SMEs and the labour

market ⁽¹⁵⁾, shows that micro enterprises tend to employ the highest share of older employees (aged 50 or older) and the lowest share of young employees (aged less than 25). SMEs employ the highest share of employees aged 25 to 50 and the lowest share of older employees. Large enterprises, in their turn, employ the highest share of young people.

The tendency for large firms to hire younger employees seems global (Hu, 2003). One of the explanations offered for this is that large firms invest more in training activities, with young employees generally perceived as being more willing (and able) to follow firm-specific training activities. The costs of training also tend to be lower for younger employees. Smaller firms are generally less willing to invest in training activities and more often search for applicants with some work experience.

A different explanation concerns the behaviour of the job candidates rather than firms: the large share of young employees in large firms may also reflect a preference of young people (who just finished their education) to start their career in large enterprises where pay may be higher and there are more career opportunities).

3.2.5. The exit age of older workers is increasing

The low employment figures for the population aged 54 to 65 should be discussed in the context of the average exit age from the labour force. Most countries are raising the statutory pension age:

- (a) in Spain the retirement age raised in 2013-27 from 65 to 67 years old;
- (b) in the UK, starting in 2018, women will have to be 65 to receive a pension, equal to men, and from 2020 onwards, the pension age will further increase to 66 years for both men and women;
- (c) in Sweden, a 1999 reform linked the payable retirement pension to the difference between the age of retirement and average life expectancy.

However, raising the pension age does not automatically mean that older workers will remain in employment for longer. The average exit age from the labour force in 2009 was about 61.5 years (European Commission, 2012b), in spite of the typical pensionable age being 65 years old and despite governments' efforts to develop incentives to stimulate longer working lives, while phasing out early retirement measures.

The 2012 Eurobarometer survey on active ageing shows that 'the majority of citizens (59%) think they will carry on working until they are in their 60s; up to

⁽¹⁵⁾ EIM Business and Policy Research, 2011.

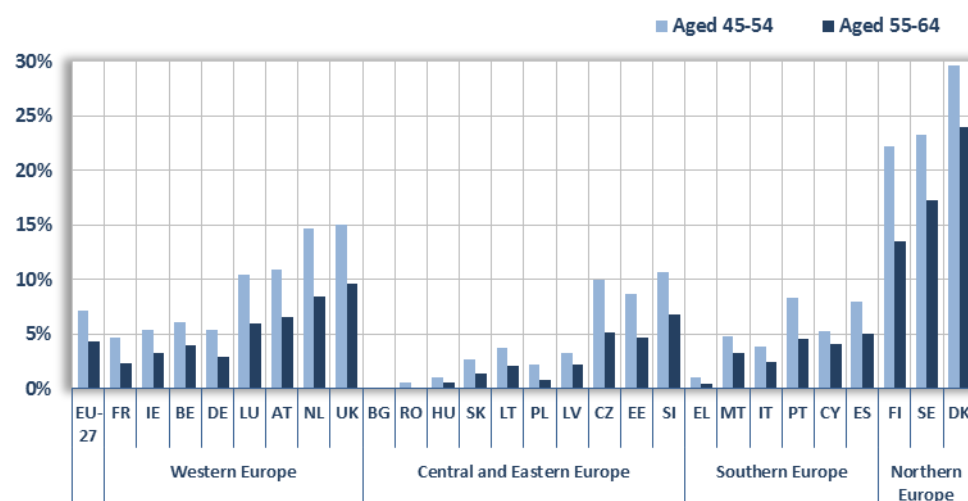
61.7 years on average. The expected retirement age differs by the current age of respondents, with those aged 55 years and over expecting to work until 66 years while those aged 15 to 24 only expect to work until 56.7 years' (European Commission, 2012b, p. 8).

The outcomes of this survey also show that 42% of Europeans believe that they will be capable of doing the work they are currently doing beyond the age of 65, while 17% expect that they will not be able to carry on in their current job until they are 60 (p. 55). One third of Europeans say that they would like to continue working after they reach retirement age (p. 74), and the idea of combining a part-time job and a partial pension is more appealing than full retirement to almost two thirds of Europeans (p. 76).

3.2.6. Older people participate less in learning

Figure 4 shows the participation of older people in learning, using data from the EU labour force survey 2011. One striking aspect is decreasing participation by age in all EU-27 Member States: the rate for adults aged 45 to 54 is above 7% while for adults aged 55 to 74 it is below 4%.

Figure 4. **Share of adults participating in education and training by specific cohorts in 2011**



Source: Calculations based on Eurostat, labour force survey, 2011.

Participation generally decreases with age, with the highest drop occurring between the two youngest cohorts analysed (45-54 and 55-64). However, research from Germany suggests that age by itself (probably) does not explain the low participation rate, once it's controlled for other factors (Schröder et al., 2004). Time spent in training follows the same pattern (OECD, 2011).

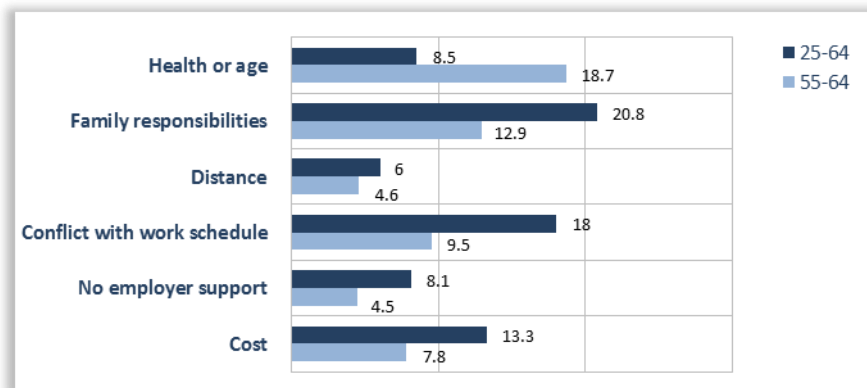
According to the Eurostat adult education survey of, 2011, only 26% of older employees had taken part in formal or non-formal education and training during the past 12 months, in contrast with 41% when all employees are considered.

There seems a strong relationship with educational attainment: as they get older, employees with previous vocational education tend to participate more in adult education than the ones without any previous record of vocational training.

Firms may also give lower priority to education and training directed at older employees, due to expected lower economic return associated with a shorter remaining active working life relative to their younger colleagues.

The results of the adult education survey highlight that health or age reasons are the main justification for non-enrolment among the age group of 55 to 64, with 18.7% giving this reason for non-participation.

Figure 5. **Reasons for non-participation in learning**



Source: Based on Eurostat, AES, 2011.

The second important reason for non-participation is family responsibilities, but this is more relevant for younger employees (probably due to the care of children). Older people see significantly fewer obstacles to participation in training than the young, once health or age reasons are ruled out of the analysis.

The relative importance of each reason varies considerably from country to country. For example, the category 'health or age' varies from 7.8% in Germany to 63.9% in Hungary. It was not possible to identify any geographical pattern in this variation.

The cost argument also varies greatly, from 6.5% in Belgium to 59.6% in Croatia. The justification of cost is generally more important in the eastern part of Europe than in the western and northern parts, with high relevance in Bulgaria (36.8%), Estonia (33.4%), Poland (27.1%), Romania (24.4%) and Slovakia (22.9%) and low relevance in Cyprus (2.4%), the UK (4.1%), Norway (4.3%) and

Finland (5.6%). Other surveys carried out in national contexts suggest the same (such as Bender et al., 2009).

Older workers tend, nevertheless, to have a high level of undocumented learning activities at work. Schalk and van Woerkom (2010), based on a sample of more than 5 000 employees (average age 39.96 years) from seven countries (Belgium, Germany, Israel, the Netherlands, Spain, Sweden, the UK), working in a diversity of sectors observed that older employees experience more on-the-job learning opportunities in their job than younger employees.

This has a number of positive effects: they are more satisfied with the organisation's provision of learning opportunities to the worker, feel more self-commitment to learning and developing, and feel less likely to change or quit their jobs compared to younger workers. The same study revealed that this type of learning opportunities given in the job are positively related to employability and job satisfaction, and negatively related to the intention to quit. For older workers, job satisfaction scores higher than employability.

The results also show that the group of 'older workers' is not as consistent as expected and that there are large differences between the age category of 45 to 55 years old and older than 55 years. The figures for the group older than 55 shows a decline in the scores of most of the variables included in the study (learning opportunities, provision of training and development opportunities, employability, job satisfaction and intention to quit) compared to the group of the 45 to 55 years old.

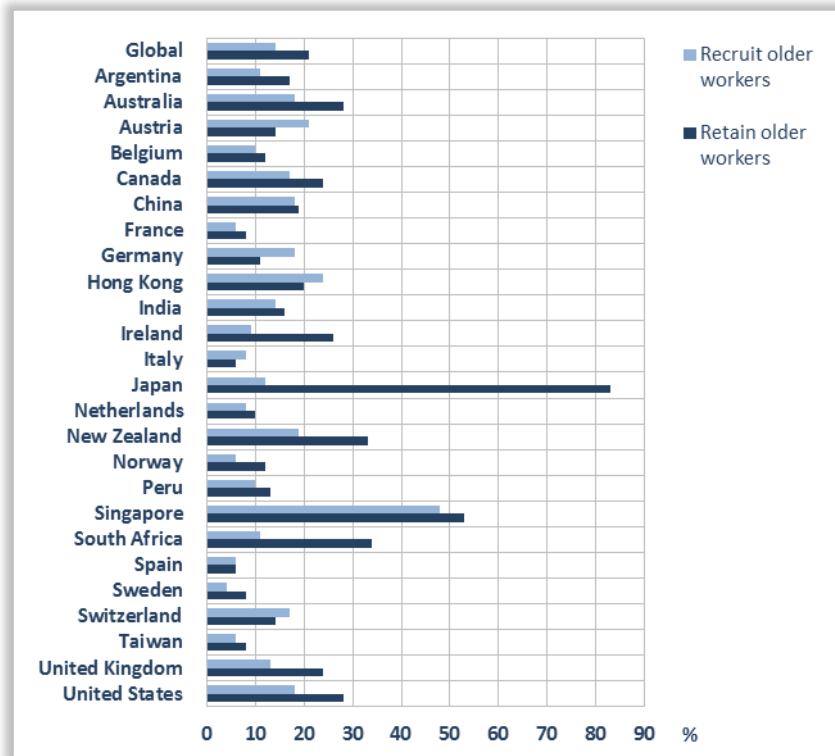
3.3. Active age management in organisations

3.3.1. Few recruitment or retention strategies for older workers

There are few European statistics available on whether companies have implemented active age management policies. Some evidence can be found, although a little outdated.

A Manpower survey across 25 countries in 2006 (Manpower, 2006), provides some insight into whether or not companies have adopted strategies to recruit or retain older workers (Figure 6). Only 14% of employers reported a strategy for recruiting older workers into their organisation and around one out of five (21%) employers from around the world said they had a strategy for retaining older workers over the standard retirement age.

Figure 6. **Recruitment and retention of older workers in companies**



Source: Manpower (2006).

Recruitment strategies specifically targeting older workers are employed more frequently in Singapore (48%), Hong Kong (24%) and Austria (21%). Older worker retention strategies are the most prevalent in Japan (83%), Singapore (53%), South Africa (34%) and New Zealand (33%). Except for Austria, all European countries score below the 20% on both questions.

3.3.2. Older worker have different working conditions

Age is an important factor in describing working conditions, with significant differences emerging between younger and older workers. The European working conditions survey (Eurofound, 2008) shows that younger workers are the most exposed to physical risk factors at the workplace and the least satisfied with working conditions. However, they have more training opportunities.

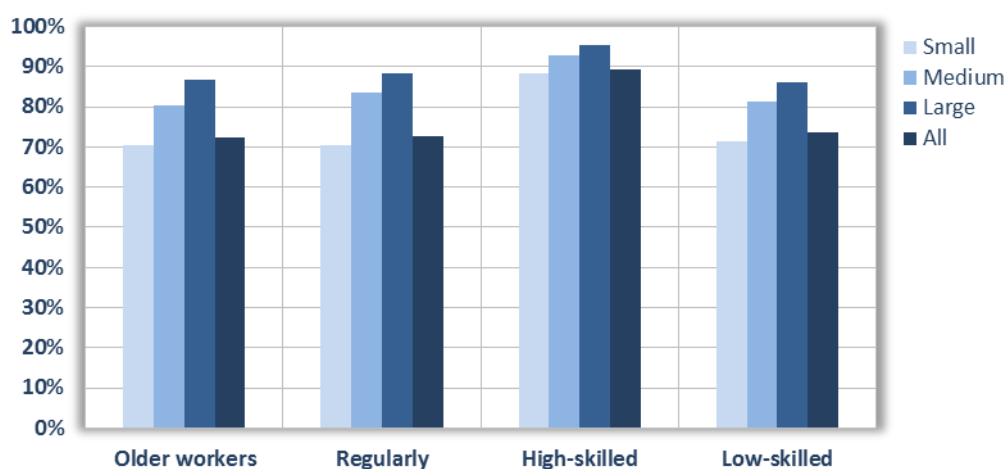
Older workers are more protected against risk exposure, have a higher degree of autonomy at the workplace and a lower degree of work intensity. However, they receive fewer opportunities with respect to involvement in new organisation forms, training and learning new tasks at work. Adult workers also carry a heavier burden in relation to caring activities outside of work and report lower levels of satisfaction with work-life balance.

Large organisations assess the training needs of older workers more frequently.

The 2009 Eurofound European company survey ⁽¹⁶⁾ shows that the percentage of companies assessing the training needs of older workers follows very closely the proportion performing training needs assessment regularly. This suggests that the needs of older workers are assessed in firms where training needs are assessed regularly, as part of the general practice for all staff. This survey also shows that large organisations assess the training needs of older workers more frequently than SMEs (Figure 7); this also, follows the general pattern for all workers. Firms assess the training needs of employees in skilled or high-skilled positions more frequently.

Figure 7 shows how the percentage of employers assessing the training needs of older workers differs by country. Low percentages of companies assessing the training needs of older workers can be found in Denmark, Luxembourg, the Netherlands, Romania and Turkey, while Portugal, Finland, Sweden and the UK report high percentages.

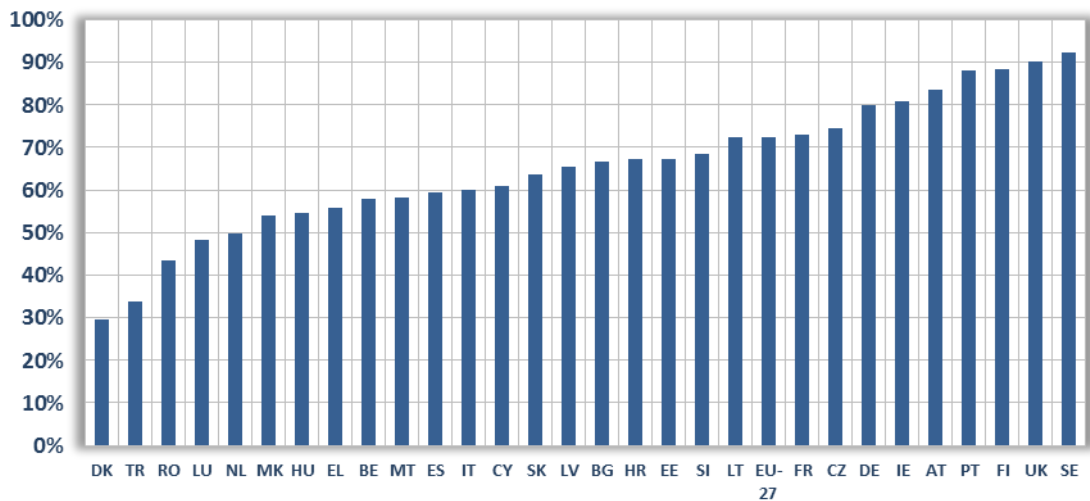
Figure 7. **Percentage of companies assessing the need for further training for different target groups (in small, medium, and large organisations)**



Source: calculation based on Eurofound, European company survey, 2009.

⁽¹⁶⁾ <http://www.eurofound.europa.eu/surveys/smt/ecs/results.htm> [accessed 27.3.2014].

Figure 8. **Percentage of companies assessing training needs of older workers**



Source: Calculation based on Eurofound, European company survey, 2009.

3.3.3. **SMEs provide fewer training opportunities**

Consistent with Eurofound's data on training needs assessment, a recent study of the European Commission on SMEs and the labour market confirms that the provision of training differs in amount and type, across the size class of organisations (EIM Business and Policy Research, 2011).

The most common training methods within SMEs are on-the-job training and self-directed learning. More than half of all European SMEs mention that these activities have been available for at least some of their employees in the previous year. Less common are enterprise-provided training courses which have been used in about half of all European SMEs. Mentoring programmes, job rotation, learning cycles, study visits and exchanges or secondments are not common practice among SMEs.

The most common training methods for large enterprises are on-the-job training and internal and external training courses; these are provided at more than 90% of larger firms. Not as common are mentoring programmes, learning circles, study visits and exchanges: 43% to 53% of all large enterprises have not made use of these activities during the past year.

These findings suggest that micro and small enterprises have a preference for less formal training activities in comparison to large firms; this is also the conclusion from a recent study on training activities in the UK. According to this study, 'Formal training is indeed limited in small firms, and links between formal practices and outcomes in terms of workers' skills are much weaker than they are in large firms. There is some evidence that informality acts as a substitute, and that small-firm workers are more satisfied with training opportunities than their large-firm counterparts' (Edwards, 2010, p. 3).

Also consistently with the indications of the Eurofound study, the European Commission research reveals that enterprises with a higher share of full-time employees, of employees with a high education level, and of young employees are more likely to develop training activities.

Training activities are also more likely in innovative enterprises. Innovation is not only relevant at micro level, but also at macro level: training activities are used more often by more employees in countries with a higher score on the Innovation Union Scoreboard 2010 (European Commission, 2011).

3.3.4. Validation of non-formal and informal learning within enterprises

Learning occurs in firms in non-formal ways, outside the context of training courses. People acquire knowledge as well as personal and technical experience which carries value for both individuals and organisations. It is important that these skills and knowledge are identified, signalled and put to good use for both individuals and firms.

If correctly identified, workers' skills and knowledge can be complemented by training and successfully integrated in more complex processes in firms, fostering innovation and increasing the quality of products, services and processes. The potential of older workers is very high, given their life and professional experience, but their knowledge and skills are frequently invisible and not conveniently valued or used.

Validation of such skills is important in increasing the productive contribution of older workers to organisations, making skills visible and suggesting potential areas for career development. This is even more relevant where many of the older workers, in spite of their relevant experience, have very low qualification levels. Low qualifications thwart older workers' labour market participation and undermine the possibility of late career development.

The *Council recommendation of 20 December 2012 on validation of non-formal and informal learning* (Council of the European Union, 2012) acknowledges the essential role these processes can play for an ageing active population and prompts Member States to develop comprehensive validation systems, by 2018. These systems should engage all stakeholders and cover all sectors, including privately owned firms. A key question is how European enterprises effectively validate formal and informal learning.

A recent Cedefop study on assessing competences in enterprises concludes that European enterprises are giving high priority to making knowledge, skills and competences visible, but the term 'validation' is not well known (Cedefop, forthcoming). The term 'competence assessment' is widely accepted and preferred by most.

Companies have various reasons to perform competence assessment: defining recruitment criteria, career development of staff, planning the transmission of knowledge and the replacement of older staff. Competence assessment is sometimes required for company quality assurance of management systems/standards, in restructuring and organisational change. At other times it may be mandatory, according to national labour law.

This Cedefop study also highlights that not all company segments or groups of employees are assessed to the same degree; activities are mostly focused on managers and high qualified technicians and engineers. The report does not address the specific situation of older workers.

One other conclusion of the study is that companies rarely use common methodologies or presentation formats, or share terminology for referencing knowledge, skills, and competences. Also, the connection between private and public validation frameworks is limited. For both these reasons, validation systems across firms tend to be either opaque or not very compatible, limiting the mobility of employees between enterprises.

3.3.5. Examples from countries studied

Given the lack of overarching statistics on guidance and active age management in the workplace, this study gathered additional information at national level. Generally, information on country level echoes lack of systematic quantitative data collection on this topic, although some studies were referred to at national level.

Generally, these studies confirm the low awareness of age management issues within companies across Europe. Recent research, for example on human resources strategies in companies in the Czech Republic, shows that only 13% of Czech employers have included efforts to retain older employees in their strategic plans.

In the UK, a survey of human resources professionals showed that only a quarter of organisations had a strategy for career development for all staff, and only a third felt that senior management was committed to career management activities. Only some of the organisations reporting a strategy provide some type of guidance to their staff.

Low awareness of the relevance of age management and the role of guidance starts partly with stereotypical perceptions of older workers. In Sweden, for example, a recent survey shows that approximately 25% of union representatives and 15% of employers believe that older people should retire earlier to make way for younger people (Swedish Government, 2013). Many older

people have, nevertheless, indicated in surveys that they would like to work longer.

Sources in some countries also claim that many companies show little interest investing in strategies for promoting education for all ages, and in particular for workers over 50; the benefits are not seen as proportionate to the costs. In other cases, adult workers avoid training and retraining because they are unwilling to change old habits, or do not trust the general purpose of the learning activities.

Despite general low awareness of age management issues, there are a few examples of companies that successfully incorporated comprehensive systems and organisational solutions in their management strategies and everyday operations. In Denmark, for example, the trade union HK reports that one out of three members were covered by an age management strategy in their last job. For those formerly employed in the private sector, almost 80% were not covered by a senior scheme.

A survey among training enterprises in Germany, carried out in 2008, also shows a more positive picture, reporting that 67% of enterprises which provide continuing vocational training to their staff take the age structure of the workforce into consideration. Of these enterprises, 36% were aware of government funding programmes and 35% feel that continuing vocational training targeted for older employees is a good idea.

The differences in awareness of this subject are also influenced by the fact that in some countries, especially the new Member States, active ageing is a relatively new concept. For example, although statistics are not available there are reasons to believe that most Estonian enterprises have not implemented any active age management policies, since the whole concept of active ageing and everything related to the subject is quite new and awareness is rare. This type of deduction is not supported by objective data, rather being derived from anecdotal evidence in interviews and conversations during fieldwork.

The economic crisis generally had a negative impact on age management policies, receiving less attention than in previous years. A concrete example was reported in Italy where government funding cuts drove a number of enterprises which developed interesting practices in age management to interrupt these practices (ASPA, 2010). Similar reports were found in Spain, from national experts, suggesting that this could also apply in most of the EU.

National level information also suggests that age management seems to follow a pattern in terms of the size of the firms. When practices are in place they are developed either by the larger (multinational) organisations or, at the other end of the spectrum, by small family firms. This suggests an association between

age management practices and higher organisation of human resources procedures, in the former case. Family-owned culture, allied to the difficulty of replacing experienced staff in very small units, likely applies in the latter case.

Regional differences are sometimes reported. A study in Italy indicates that most companies that employ active age management policies are located in the north of Italy, while the rest were located in the central area, and none from the south.

3.4. Conclusions

This chapter assessed different European sources on the employment situation and lifelong learning activities of older workers and enterprise policies on education and training.

Assessing the progress made on EU employment targets for older workers suggests that:

- (a) countries are increasingly employing older workers in 2000-10;
- (b) countries differ strongly in their employment of people aged 55 to 65;
- (c) differences occur in the number (and percentage) of older employees in the different economic sectors within the EU;
- (d) gender differences occur, with female older workers having lower participation rates, with the exception of Estonia, Latvia, Finland and Sweden;
- (e) most countries are raising or have raised the statutory pension age, or are planning to do so.

The following can be concluded on training of older workers:

- (a) participation in adult learning generally decreases with age and drops most between the two oldest age cohorts analysed (45-54 and 55-64).

Research on company activities for older workers shows that:

- (a) active age management policies are still not fully embedded in organisation human resources policies, although positive examples are manifold;
- (b) age is an important factor in describing working conditions, with significant differences emerging between younger and older workers for most job characteristics;
- (c) fewer companies are systematically checking the need for further training of older workers compared to permanent employees in skilled or high- skilled positions;
- (d) CVET is less practised in SMEs compared to larger companies, while older workers are overrepresented in SMEs. SMEs also offer limited training

instruments, mainly focused on on-the-job training and self-directed learning. Larger organisations more varied training instruments (including internal and external training, mentorship, study circles);

- (e) little research is done on how guidance activities are embedded in active age management strategies;
- (f) the integration of guidance activities in the firm tends to have an instrumental, situated character, with little concern for the lifelong development of individual career paths;
- (g) previous research on career guidance in the workplace shows that, although there are positive examples of guidance and counselling in the workplace, they are frequently not systematic, not clear and do not necessarily account for individuals' characteristics;
- (h) most workplace guidance support is targeted at key talents groups such as management staff and young recruited, while most other employees, such as older workers, are expected to take responsibility for their own career development;
- (i) access by lower-qualified, older workers to guidance and learning is dramatically reduced since it becomes dependent on individual initiative to access outside, formal career support services. Older workers are frequently demotivated, with low levels of self-confidence and self-esteem, and unlikely autonomously to search for external support ⁽¹⁷⁾.

⁽¹⁷⁾ See the comments of Plant (2008) for further discussion on this matter.

CHAPTER 4.

System level approaches on guidance for active age management

4.1. Introduction

This chapter discusses how national policies and strategies address staying longer in employment and to what extent guidance is an integrating component. This includes ageing as a transversal element in policies and strategies linked to employment, education and training, and social inclusion for older workers.

This chapter examines the four policy priorities laid down by the European Council resolution on better integrating lifelong guidance into lifelong learning strategies, discussing their degree of development in active ageing policies. The four priorities are:

- (a) development of career management skills adjusted to the challenges of each career stage;
- (b) access to guidance for people of all ages and backgrounds;
- (c) assuring the quality of career guidance provision;
- (d) improving coordination and cooperation among stakeholders.

Section 4.2 addresses changing national policy perspectives on active ageing and the national instruments deployed to improve the situation for older workers and help them overcome challenges.

Sections 4.3, 4.4, 4.5 and 4.6 review how the EU policy priorities for national guidance systems are addressed by these policies. Section 4.7 draws the main conclusions from the previous sections.

4.2. Policy perspectives on the role of older workers

4.2.1. Country responses and perspectives

All country reports emphasise the changing perspectives of national governments on the role of older workers in economy and society. The global tendency reflects a shift in policy focus from early retirement to extending work life. Three lines of argument are presented to defend this policy shift: economic, demographic and social.

Countries stress the economic relevance of diversity in general. A diverse workforce within organisations will connect more closely to the consumer/client

population by reflecting its age structure, contributing to improving the commercial performance of organisations. Keeping older workers active also contributes to maintaining/transmitting knowledge and experience in organisations. At macro level, it supports the sustainability of social security, health care and pension systems.

Demographics are also relevant to active age management. The changing composition of the (working) population leads to labour market shortages in the future and keeping older workers active contributes to resolving labour market bottlenecks.

A final argument is that to uphold solidarity and ethical principles, the age structure of the work force should be similar to that one of the population (within working age).

A striking example of this change in policy comes from Denmark, where for many years labour policies aimed at increasing access of youth to the labour market rather than older people. In support, municipalities had a national agreement creating favourable options for senior employees to retire. In 2007, via a tripartite agreement between the social partners, the policy shifted towards retention of senior employees. Similar examples can be found in other European countries.

Some countries report that, despite this trend, the situation of older workers has become a secondary issue again, due to the impact of the current crisis over the younger age cohorts. In many cases, policy discussions are mainly focused on youth employment, as in Spain, under the effects of the financial crisis, and Sweden, where youth unemployment is high and has received more attention in media and in policy debates.

4.2.1.1. *Active age management policies and the potential of guidance*

Due to the changing perspective in valuing older workers, policies on active age management have emerged across Europe. Despite the fact that countries have different understanding of active age management policies and, frequently, not even a concrete definition (as reported for Estonia) some policy measures associated with active age management could be identified.

The literature review on the 12 selected Member States revealed wide variation in the extent to which they implemented policies specifically targeting older workers, and the degree to which they supported older workers through broader employment policies open to all age groups. These instruments could be categorised as legislative, financial, and communication/awareness raising measures, as presented in Table 4.

A first step that most countries seem to be making is increasing the age for retirement, through the adoption of legislative reforms. Increasing retirement age is an instrumental step in the process of active ageing which carries little implication for career support systems that can cover the life-span of workers. Literature shows a strong concern that the current debate goes only in the direction of simply raising the age of entitlement to pensions (as has been the general trend across Europe) without contemplating the consequences (Maltby, 2011).

Accompanying measures are needed to help workers throughout their career, including financial initiatives for employers to hire older workers and to keep older employees active during their (extended) career.

Guidance can play an important role in providing career development support to workers of all ages. Given its adaptability to context (workplace, training, employment service) and the fact that it possesses a holistic set of theories and methodologies, guidance can promote the autonomous management of someone's career at any point in life, whatever their situation.

Guidance methodologies can enable individuals to access reliable information about the labour market, learning opportunities and validation services. They also can help people identify their own skills, competences and aspiration to make meaningful career choices, to have better-quality working lives and to be more productive up to current pension age.

Guidance can enable individuals to increase dramatically their productive contribution to the economy and society, while maintaining relatively high levels of job satisfaction. Nevertheless, despite its potential, guidance is rarely mentioned in national active ageing strategies, legislation, or financial frameworks.

Table 4. Overview of active age management policies in 12 EU Member States

| | CZ | DK | EE | FR | DE | IT | NL | PL | SI | ES | SE | UK |
|---|----|----|----|----|----|----|----|----|----|----|----|----|
| Legislation | | | | | | | | | | | | |
| Raising the statutory pension age | X | O | X | X | X | X | X | X | O | X | O | X |
| Increasing the age for having the right to unemployment benefits | X | X | O | O | O | O | O | O | O | O | X | O |
| Reducing incentives for early retirement | X | X | O | X | X | O | X | X | O | X | X | O |
| Increasing the pension benefits according to the number of years worked | O | X | X | O | X | O | O | – | X | X | X | X |
| Sickness/disability benefit reform | O | O | O | X | O | O | – | O | O | O | X | – |
| Anti-discrimination legislation | X | X | X | X | X | X | X | X | X | X | X | X |
| Obligation to have active age management policies in the workplace | O | O | O | X | O | O | O | O | O | O | O | O |
| Obligation to hire an older worker | O | X | O | O | O | O | O | O | O | O | O | O |
| Financial incentives | | | | | | | | | | | | |
| Employer support to assist return of older workers | X | X | O | X | X | X | X | X | X | X | X | X |
| Support for unemployed older workers | X | X | X | X | X | X | O | X | X | X | X | X |
| Financial incentives to older workers to stay in employment | X | X | X | X | X | X | X | O | O | X | X | X |
| Gradual/phased/partial retirement schemes | O | O | O | O | O | X | O | O | O | X | O | O |
| incentives to promote active age management in the workplace | X | O | O | X | X | X | X | X | X | O | O | X |
| Options for flexible working for older workers | O | X | O | O | X | O | X | O | O | X | X | O |
| Promotion | | | | | | | | | | | | |
| Awareness raising and information campaigns | X | X | O | X | X | O | O | O | X | O | O | X |
| Good practice guides | X | X | O | X | X | O | O | O | X | O | O | X |

NB: X = implemented; O = Not in place; – = no information.

Source: Authors, based on literature review.

4.3. Coordination of active ageing and guidance

4.3.1. Institutional steps towards longer working lives

Since 2000, Member States have adopted a number of measures aimed at reform of the pension and social security systems. Most Member States have increased the statutory pension age, developed plans for the gradual convergence of pension ages for men and women, and have raised the age of entitlement or increased the period of contribution needed to claim full retirement benefits. Some countries are considering a link between average life expectancy and pension age, such as the case of Sweden.

In several countries early retirement schemes have been closed, restricted, or made less attractive, such as in the Dutch case, where early retirement payments are subject to special taxation. Simultaneously, various forms of gradual, phased, and partial retirement schemes have emerged. Member States have adopted career-end planning policies which allow workers to plan a transition period between work and retirement in which they can reduce working hours while benefitting from compensation allowances (Adecco Group, 2011; Eurofound, 2012a; 2012b).

The focus is shifting in all countries. Most already have reduced the national schemes for early retirement. One exception is Denmark where the retirement age has not increased, although the age to request voluntary early retirement pay (VERP) has increased.

It is also possible to combine work and the VERP: for each hour worked, a proportional deduction is made from the VERP. Older employees who are eligible for the VERP, but continue working until they turn 65 years, receive a tax-free premium of around EUR 20 000. Employees who postpone taking up the public old age pension will receive a higher pension when they actually retire.

Another example of this type of incentive comes from Sweden where income tax rates on work have been lowered, creating a tax gap between income from work and income from pensions. To encourage longer labour market participation among senior workers the government in 2010 introduced a higher in-work tax credit for people who have turned 65. To increase demand for hiring older people, contributions paid by employers is about one third for people over the age of 65, compared to younger employees. Hiring long-term unemployed senior citizens is highly subsidised (75%).

In Germany the State provides financial support to companies that grant their employees a gradual transition to retirement. Employers who offer workers aged 50 and over a job can get a wage subsidy of up to 50%. The standard

obligation to keep the worker on for up to a year after the subsidised period (*Nachbeschäftigungspflicht*) is not applicable with older workers.

In the Netherlands, extra days of annual leave linked to seniority were removed to reduce the costs of employing older workers. The Netherlands also offers compensation to companies that hire older people who subsequently become ill, as a means of risk reduction.

In Poland, the Act on promotion of employment and labour market institutions envisages partial or total reimbursement of expenses incurred in a specified period by an employer who provides employment and training to the unemployed over 50 years of age. Poland also refunds costs of social insurance premiums related to employment of an unemployed person of preretirement age.

Professionalisation contracts in France allow an employee over 55 to act as a tutor for a young worker. The company receives public funding to cover part of the wages of the old worker, thus promoting active ageing of older workers.

Italy has a similar measure, the solidarity agreement between generations. This allows for the transformation of contracts of workers over 55 from full-time to part-time, and, at the same time, to recruit unemployed young people aged under 25 (or 29 if graduates) so that they cover the hours no longer worked by the older employee.

In Belgium (Flanders) all employees aged over 45 who are made redundant are entitled to the benefits of an outplacement programme, while in Brussels and Wallonia there is a right to outplacement support at the employer's expense.

The European Social Fund is mentioned in almost all country report as an important source of funds for age management projects. Most of these focus on how workplaces can be innovative and contribute to workplace learning to deal with waves of retirement. The ESF funds mostly public sector projects.

Although ESF funding is generally reported as fundamental, the project-based nature of initiatives funded by the ESF poses challenges to their sustainability. Despite the benefits created during the implementation phase, follow-up actions and activities are usually untraceable (at least from public sources).

Pressure continues to build to devise further policy packages and support services which can help workers plan their career across the lifespan, with the perspective of more prolonged working lives. Although initiatives which attempt to work on the development of career skills and individual planning with a lifelong perspective can be identified, they are seldom found within an articulated policy. The increase of the retirement age and the incentives to for older workers to remain active are evolving at a faster pace than the establishment of guidance services to support citizens in this process.

All Member States have adopted legislation and measures to fight age discrimination. In principle, this means that a worker's age can no longer be a (formal) factor in human resources management decisions, including recruitment as well as redundancy. In some countries, there are stipulations in the labour code that make it more difficult to make older workers redundant. In Germany, the Netherlands and Sweden there is a 'last in, first out' provision in collective dismissals. In Latvia the labour code stipulates that those five years from retirement should be seen as a priority when deciding which employees are kept in employment during a collective redundancy.

Anti-age discrimination legislation might tend to encourage governments to develop generic policies, not addressing specific target groups such as older workers. By encouraging no distinction on the basis of sex, age or other factors to fight the stigmatisation of some groups, such legislation has the effect of prompting employers to manage employees' training and working arrangements according to individual needs, rather than general features such as age. This type of approach carries, nevertheless, an underidentification risk of age-related needs in the definition of both policy and firm-level support measures.

Examples of countries following generalist policies are Denmark, Estonia, the Netherlands and Sweden. Denmark is an example where older workers have the same right to unemployment benefits and to receive job-training and other offers according to active labour market policy provisions.

In these countries, with little exception, there are no special activation instruments for the older unemployed. This does not exclude the possibility of *ad hoc* measures set up by job centres combining the available instruments (training, wage-subsidies) to fit the needs of a particular target group, for instance among the older unemployed.

There are few national laws or mandatory guidelines for active age management in workplaces; the exception is France, having one of the most influential regulations in the field of active ageing. The French Law on the finance of social security for 2009, adopted in December 2008 (Loi No 2008-1330), introduced the obligation for French companies, having more than 50 employees, to develop an enterprise or group agreement or an action plan in favour of the employment of older workers ⁽¹⁸⁾.

The law invites social partners to identify in each firm specific active ageing issues: recruitment of older workers; anticipation of career development;

⁽¹⁸⁾ If no action is taken, companies are fined, and they must pay a penalty of a 1% of the total payroll during the time the enterprise lacks these agreements/plans (since 1 January 2010).

improvement of working conditions and risk prevention; skill development and access to training; facilitating the work-to-retirement transition; knowledge and skill transfer and the development of tutorship programmes. All these issues can be supported by guidance activities but there is no specification of which activities to develop.

A recent study published by the research department of the French Ministry of Labour, Employment and Social Dialogue (DARES, 2011) evaluated the first qualitative impacts of the resulting older worker action plans and agreements. This study revealed relatively low concern with the mature stages of career development: issues such as the hiring of older workers and transitions from work to retirement had reduced relevance in the analysed agreements.

The general absence, across the EU, of guidelines on how guidance activities can be developed in workplace contexts means no contribution to the development of late career support. The examples which do exist (in Denmark, Finland and the UK) frequently depart from strong stakeholder engagement in active ageing in firms, independently of the existence of favourable normative settings. Further analysis follows in the next section.

4.3.2. National strategies and types of stakeholder engagement

Despite a relative absence of legislation on this matter, national strategies for active ageing have reportedly been developed in several countries in Europe. Nevertheless, few recent initiatives have so far led to the introduction of concrete measures to support active ageing, including guidance for older workers.

In the Czech Republic, national interest in active ageing is defined in major strategic documents based on programmes and recommendations given by the European Union and the United Nations. However, action (such as the national programme of preparation for ageing) tends to be restricted to proclaiming the importance of care for the target group 50+, with little in the way of specific and practical measures that could be characterised as guidance activities.

In Denmark, Germany, France and the Netherlands, comprehensive approaches to active ageing are the result of national tripartite dialogue or sectoral social partner negotiations. In some countries (including France) comprehensive approaches are implemented through national legislation based on social partner agreements, requiring the introduction of age management planning and management policies in companies.

Guidance often does not have a specific place in this very broad active ageing strategy development. Generally, there are no designated funds for lifelong guidance as an instrument for age management, although in practice

some type of guidance support for older unemployed persons and older workers tends to be available.

The Czech Republic introduced in 2008 a follow-up to the initial programme Quality of life in old age. The programme now covers four main areas: education, the social security system, employment policy and social partnerships, but still lacks specific guidance measures on labour market issues and employment.

Where guidance is embedded in national policies, most of the time it concerns career guidance implemented in active labour market policies, education and VET provision, without necessarily being articulated within an active ageing policy package. These diverse policy areas and sectors, in turn, might not be closely integrated and might involve many stakeholders.

The countries studied have a diverse set of actors involved. Some emphasise (semi-)governmental actors at national and regional levels (such as PES), and some have a more (decentralised) industry-oriented focus. In most countries, unions and industrial organisations (the social partners) play an important role in making guidance available within companies. Most countries offer guidance at decentralised level (regional or industrial).

With a decentralised approach to guidance and active age management, governments tend to act more as facilitators, rather than providers. In such cases national government plays a bigger role in the dissemination of good practices in age management and by stimulating (for example via funding) the creation of good guidance support services. The more decentralised the approach, the greater the focus on stimulating the development of the guidance instead of on the direct provision of guidance.

In many countries social partners, through collective bargaining, enter into agreements on guidance and active age management. Strategies for guidance, education and up-skilling are based on all the relevant players taking joint responsibility. Guidance in active age management has found a successful place in the vocabulary of big corporations and some middle-sized enterprises in most countries, particularly in firms with international experience and self-contained human resources departments.

Guidance is frequently attached to specific institutional environments which reflect more a sector taxonomy (education, VET, employment) than the life cycle of individuals. The level of formal integration of guidance services across these sectors can be very low, as can the degree of cooperation between interested stakeholders. As a result, the life-span theoretical framework that guidance offers to support age management strategies might not be reflected in the practical organisation of guidance services, which can be scattered across distinct policy fields and levels.

One concrete example of coordination challenges comes from France, where guidance encompasses various services and many providers across the country. This generates enormous institutional complexity: not only is the system strongly segmented in groups of users (young people, employees, job seekers), but it is also not uniformly decentralised, with variation in the way national and regional authorities are involved. Many public decision-making instances and levels responsible for guidance in France appear as an obstacle and many public and semi-public organisations, private organisations and associations of all kinds appeared over the past 20 years as guidance providers.

Another example is the Netherlands, where career guidance is quite commercialised and decentralised. This process of decentralisation and market orientation has resulted in four types of providers: the education system; other government services; employers and trade unions; and private-sector organisations. This fragmented system is largely composed of disconnected activities, in which there is low accountability and it is difficult to establish monitoring and quality assurance. The government role also becomes unclear within such a system.

Frequently there is also limited cooperation between different actors at central level. For example, the institutional system of vocational guidance in Poland separates education from labour, making cooperation between the ministries responsible for both areas rather difficult. Such examples of difficult inter-ministerial cooperation are frequent across Europe.

One of the main initiatives to overcome this has been the establishment of lifelong guidance forums (Cedefop, 2008b) across Europe, to achieve greater coordination between relevant stakeholders. Frequently these forums start with joint initiatives, at central level, of the Ministries of Education and Labour/Employment.

The forums may also be formed with a bottom-up logic, starting with the participation of users and direct providers in defining policy. This is the case of the German National Guidance Forum in Education, Career and Employment which was established as a legal association in 2006.

Another example is the establishment of the Slovenian association for career guidance in 2009, with the aim to accelerate the development of career guidance services and to assist guidance professionals in their work and own professional development. They organise regular meetings, seminars, workshops, conferences and exchanges.

The UK provides successful examples of coordination in guidance for age management. The most important contribution is the participation of non-government organisations, such as Age Concern, the Employers Forum on Age

and the Third Age Employment Network, in the policy debate surrounding older workers. Trade unions, through the Union Learning Fund, are also helping to promote training more generally. The fund supports union-led projects to transform the lives of their members through lifelong learning opportunities.

The issue of guidance has become a growing political concern over recent years in France. The Law of November 2009 about lifelong guidance and vocational training (Loi No 2009-1437) created a new integrated service to ease access to career counselling; it offers simplified access to information and resources via a single phone number, a single e-mail address and the possibility to receive information and advice online from career advisors. The inter-ministerial delegation created is responsible for coordinating guidance policies at national, regional and local levels.

In conclusion, there is a diversity of actors across countries, sectors, administrations and institutions in provision of guidance (Cedefop, 2011b). The current service provision is often fragmented and uneven in terms of accessibility and the main (national) focus seems to be on the unemployed and young people.

Effective policies for lifelong guidance need to involve a number of different authorities and stakeholders. A national lifelong guidance forum is a mechanism to bring these together, to produce more effective policy development and more harmonised service provision. This can be complemented by regional and/or local forums (Maltby, 2011).

4.3.3. The growth of validation: valuing the experience of workers

The need to validate the relevant learning experiences of workers has been a growing policy priority across Europe. Accreditation of prior learning systems (Stephen, 2006) are found in a number of countries throughout Europe and the subject is well documented through the European inventory ⁽¹⁹⁾ initiated in 2004 and is regularly updated (Brown et al., 2010).

Recognition of prior learning (RPL) in Europe was first pioneered at national level by France with the Law on *Bilan de compétence* in 1985 and the Law on the validation of skills acquired by work experience in 1992. In the last two decades, many Member States have started to establish institutions, procedures, and instruments to aid identification, assessment and recognition of adult learning taking place outside of formal education and training institutions in non-formal and informal adult learning environments.

⁽¹⁹⁾ European inventory on validation of non-formal and informal learning
<http://www.cedefop.europa.eu/en/about-cedefop/projects/validation-of-non-formal-and-informal-learning/european-inventory.aspx> [accessed 27.3.2014].

The growing emphasis on lifelong learning since the mid-1990s implied a stronger focus on the link between the modalities of adult learning in different areas of social activity throughout the life courses of adults. While formal education systems are still very much focused on initial education and training, the development of lifelong learning systems faces the challenge of linking a variety of formal as well as non-formal and informal areas of adult learning.

As people get older and more experienced, acquiring knowledge, skills and informed perspectives, they also increase their potential: as active contributors to the development of organisations, to the knowledge flow between generations of workers, as mediators in innovation processes, and as participants in management decisions. The acquired experience is also a potential platform for workers to progress to different development stages in their careers, where they can have new responsibilities and roles.

To amass this potential, the experience of people needs to be visible and translated into a language which relates to the skills needs of organisations and the qualification systems enforced by law or sector conventions. Once the relevant experience of workers is identified in this way, and both organisations and workers themselves become aware of it, new possibilities of career development and job placement can be opened.

Guidance plays a large role in this process. It should precede it, by making an initial assessment people's experiences and advising validation. During validation, it should help by identifying skills, clarifying needs and potential development paths, and after validation by helping people plan the next steps in their careers.

In the concrete case of older workers, guidance needs to be inserted in their work context, given that, these workers will seldom autonomously seek counselling. Further it needs to be provided in a way in which it is felt as a voluntary, ethical process, rather than an imposition of management or a stigmatising process (tagging the worker as useless or in deficit of skills and personal traits).

Validation procedures have now become a common issue in the national systems since Member States agreed the common European principles for validation of non-formal and informal learning in 2004. They were further developed in the European guidelines in 2008 in the context of underpinning the European qualification framework.

Despite the emergence in recent years of agreed EU frameworks for qualifications and competences, information collected at country level demonstrates that the development and practices of RPL in Member States have

different points of departure, depending on historical, political, economic, and cultural forces.

Information collected at country level indicates that recognition of prior learning and accreditation of prior experiential learning have already been implemented in several countries, but that the progress achieved otherwise varies from promising initiatives to little progress made in a few countries. Three basic modalities for the organisation of RPL procedures can be identified:

- (a) integrated RPL procedures in the formal system;
- (b) RPL procedures parallel to the formal system;
- (c) open RPL procedures (Broek et al., 2010).

The Council of the EU has given a new boost to the development of validation systems across Europe, by adopting the new recommendation on the validation of non-formal and informal learning in 2012 (Council of the European Union, 2012). This document prompts national States to implement, no later than 2018, systems which allow for the validation of knowledge and experience obtained via non-formal processes.

While acknowledging the need to adapt these systems to national and local contexts, the recommendation clearly defines four stages for validation: the identification of the acquired knowledge and skills, the documentation of these learning outcomes, their assessment, and certification of the assessment results, in the form of a qualification. The identification and assessment stages are particularly supported by guidance methodologies and require intervention by trained professionals, to be entirely successful.

The recommendation also stresses the active role of employers and trade unions in supporting the development and successful operation of the validation systems, given their access to workplace contexts. The results from the Cedefop study on validation of skills in European enterprises highlight specificities of these systems, when confronted with the more general national public validation systems (Cedefop, forthcoming).

4.4. [Access to guidance for older workers](#)

Career guidance is still highly fragmented, and overall national strategies are often lacking, especially in the context of active ageing. The lack of national policies to assure career guidance on the in the workplace limits the access to such.

Access to guidance in most countries is provided by external actors, such as public employment services and VET schools, but these are generally focused on

young age cohorts (initial education and training) and the unemployed (employment centres) limiting the access for (employed) older workers.

Several countries report on the right for guidance, although no specific reference is made to older workers, since this right is universal for all citizens. A relevant example in this respect is Sweden, with a long tradition in the provision of public guidance services. In the 1940s employment offices started to offer vocational guidance for their clients. The underlying principle has always been that career counselling is an individual right should be free of charge and available to as many groups as possible.

Germany also guarantees the right to guidance. The German social code includes a general right for guidance in the social and the labour market sector. The German system provides access to services in education guidance (*Bildungsberatung*; in the education sector) and in vocational guidance (*Berufsberatung*; in the vocational training and employment sector) for all citizens at any stage of their lives: in education or training, employed, unemployed or looking for continuing education.

Two important reforms were made in France towards a universal right to guidance provision: the Law of February 2008 on the reform of the public employment service (Loi No 2008-126) gave to *Pôle emploi* the task to inform and guide active people (unemployed or employed); the Law of November 2009 on lifelong guidance and vocational training (Loi No 2009-1437) created a 'public lifelong guidance service' to guarantee all persons access to free, full and objective information on occupations, training, certification, job opportunities and remuneration levels as well as to quality, networked guidance advisory and assistance services.

Older workers are often defined as one of the vulnerable groups that need specific attention in public employment services provision, such as guidance, counselling, training, and placements. This does not mean that, despite such classification, there are special measures targeted at older unemployed persons.

An example is Estonia, where older unemployed persons of 55 years up to the pensionable age are listed as one labour market risk group in the labour market services and benefits act. There are, nevertheless, no special measures for only older unemployed persons; an individual plan is made for all unemployed persons and labour market measures are offered based on their individual needs.

Some public employment services provide specific policies for older workers, such as that in Denmark which is obliged to offer early activation to the unemployed aged 60 and above. Another example is France, where the website

of *Pôle emploi* ⁽²⁰⁾ presents a list of services specifically aimed at senior job-seekers, which includes assessment and training for job searching, specific information of interest and much more. Also, *Pôle emploi* helps them in the elaboration of a personal diagnosis (skills, strong/weak points) and offers training on job searching tools. Specific contracts are developed (the CDD senior contract) dedicated to unemployed people over the age of 57 and can be concluded for a maximum of 36 months.

The internet is playing an increasing role in providing access to guidance, with public employment services featuring in this. In the Netherlands, for example, the government appears to see itself having a role in making career information accessible and so stimulating self-help; the *opleiding en beroep* (education and profession) portal ⁽²¹⁾ has been set up for this purpose. The Dutch public employment services (named UWV) website ⁽²²⁾ offers much information for self-help in career guidance, including customised relevant overviews of education and training possibilities. Professionals have noted, however, that self-help in the field of career development is not an option for many people. Career issues often need more structured guidance by a career advisor who is physically present.

In Spain, the website of the public employment service ⁽²³⁾ offers specific services for particular target collectives: this includes workers over 45 years as well as disabled workers, women, youngsters, entrepreneurs and the long-term unemployed. The website offers information on training and skills accreditation, subsidies and income support, and data on the labour market in general.

The trend seems to be in the direction of the self-serving citizen. A lot of information is available, but individuals need to have an active attitude towards finding and gathering the information and possibilities regarding guidance. There are four main concerns about the multiplicity of online services offered:

- (a) the quality of service is variable, with costs of entry into this market being much lower for limited support. Higher quality, research-based, comprehensive support has much higher costs of entry.
- (b) the information needs of users are specific and complex. Many employed adults pursue their careers in specialised labour markets and require highly

⁽²⁰⁾ <http://www.pole-emploi.fr> [accessed 1.4.2014].

⁽²¹⁾ <http://www.opleidingenberoep.nl> [accessed 1.4.2014].

⁽²²⁾ <https://www.werk.nl> [accessed 1.4.2014].

⁽²³⁾ <http://www.sepe.es/> [accessed 1.4.2014].

- specific labour market information to support their decision-making. There should be sector-specific initiatives;
- (c) individuals with a low level of computing skills or access may be excluded from using these services. In some countries bandwidth limitations and cost of internet access may restrict the range of resources that can be accessed;
 - (d) online services cannot replace face-to-face counselling and its potential, due to their natural physical limitations and setting which only allow for certain sets of guidance activities (normally self-assessment and information) frequently without any direct professional support.

Most Member States have designed awareness and information campaigns to promote a change of attitude towards older workers and the need for everyone to work longer. They target businesses, prompting them to hire and retain older workers as employees. This often takes the form of developing websites, developing practical guidelines and setting up working groups, sharing good practices and involving key actors in the business world.

An example is the website Seniorpraksis.dk⁽²⁴⁾ in Denmark, setup by the National Labour Market Authority to be a knowledge resource for companies to access methodologies, documented experiences and inspiration, to develop their own active age management to maintain and recruit senior employees.

The Department for Work and Pensions in the UK puts much effort into workforce management by employers, especially through the Government's age positive initiative. This initiative was designed to help employers develop good practice, supporting them in all aspects related to employing older workers, granting access to guidance services, mostly available online.

4.5. Assuring guidance provision quality

Guaranteeing citizen access to guidance is one important priority of policy development, but it must also be assured that the services provided match quality standards. The development of a comprehensive and cross-industry quality-assurance framework is very important for citizens who are seeking guidance, as well as for service providers and funding bodies (whether public or private) (Maltby, 2011). Nevertheless, when looking at guidance at company level, it seems to be mostly up to the company to assure quality guidance provision and to determine the requirements for guidance practitioners. Despite the frequent

⁽²⁴⁾ <http://seniorpraksis.dk> [accessed 1.4.2014].

lack of quality assurance mechanisms at company level, the countries studied report developments to assure quality of guidance by external providers.

Only a few countries have commonly agreed quality standards for service delivery. A good example is the UK's Matrix accreditation system which covers quality assurance in adult guidance and information services/organisations. All key information, advice and guidance (IAG) providers in the UK operate in line with formalised systems of quality assurance; most providers are also accredited against an externally regulated standard such as matrix or charter mark. Matrix is the UK standard specifically designed for organisations that deliver IAG on learning and work opportunities.

More frequently, countries have set requirements for guidance staff. In Poland, for example, vocational guidance is one of the four basic labour market services provided by the public employment services and so should be delivered in accordance with the obligatory standards. The system of licences for vocational counsellors employed in labour offices was created to improve their services relating to vocational guidance and information.

Vocational counsellors are university graduates having a three-year bachelor degree in pedagogy, a two-year master degree supplementary pedagogical course, a master degree study in psychology, a specialisation in psychology of vocational guidance, or a post-graduate study in vocational guidance for people with higher education, other than psychological education.

In Denmark, guidance practitioners are required to complete a diploma programme in educational and vocational guidance or document equivalent competences through prior learning. A professional bachelor degree in education and vocational guidance has also been established.

In the Netherlands, education career advisors have the opportunity to apply for a personal certificate to demonstrate that they possess the required competences. The certifying body is Certiforce C.i. (accredited for this purpose by the Accreditation Council) and it complies with the accreditation criteria laid down in the standard ISO/IEC 17024:2003.

In other countries, career guidance providers deploy their own quality systems, such as the German FEA. This operates a quality assurance system which takes the quality and outcomes of guidance interventions as a contribution to the overall achievement of the organisation, including placement activities and financial support. Data are extracted from the customer database and regular customer surveys. As part of a quality assurance process, a professional career guidance register (*Berufsberatungsregister*) has been established for guidance

practitioners, with the possibility to be accredited as qualified counsellor based on certain quality requirements ⁽²⁵⁾.

Other countries developed guidelines or manuals for providers and career guidance staff. In Estonia, for example, the Foundation Innove, together with the Ministry of Education and Research, developed three different quality handbooks in 2010: one aiming at management, a second on provision of career information and counselling, and the third on career education.

These quality manuals were tested in youth centres and partner schools in 2011-12. Currently the concept of career services is being developed for 2013-20 and also includes the elaboration of quality system for career services; in this agreed quality standards and the quality of the services will be systematically monitored, analysed and evaluated.

Another example is the Swedish Association of Guidance Counsellors (SAGC), a non-profit organisation funded by its members. This has developed ethical guidelines for all guidance practitioners who are members of the association with the aim of coordinating the work of career guidance counsellors and to support practitioners.

The Swedish public employment service uses quality assured methods for its guidance services. There are also three university colleges offering three-year education programmes granting a diploma in guidance. There are guidelines from the Swedish National Agency for Education for guidance offered within the education system.

Where countries have a quality policy in place, this is most likely a non-mandatory system, though some are working on a national quality guidance system. For example, the Ministry of Employment in Italy is committed to developing general policy regulation for the creation of an organic national guidance system. This system will take into account the different users' targets, so guaranteeing a quality service. The general trend is still, however, that there does not seem to be a strong system for assuring quality in guidance at country level. Although there are positive developments across Europe in setting quality standards for guidance delivery, the overall impression is still that there is no sufficient systematic evaluation of the quality of guidance activities (Cedefop, 2011b).

⁽²⁵⁾ <http://www.bbregister.de> [accessed 1.4.2014].

4.6. Career management skills and active ageing

The notion of CMS has only recently entered policy vocabulary and still generates perplexity. CMS are generally associated with skills, attitudes and knowledge which individuals can develop to make informed and reflexive career choices and management.

These will generally include skills and knowledge associated with decision-making, identification of career and learning opportunities, adaptability to new work and learning situations, and increased awareness of one's qualities, preferences and development needs. Guidance activities very clearly aim at developing these skills, in a logic of individual empowerment and progressive autonomy.

The development of CMS has become particularly important in policy agendas with the impact of the economic crisis, which degraded the possibility of stable career paths. The need to ensure that people possess the right skills and knowledge to cope with unexpected career events, adapt to new work and learning environments, and make unusual career decisions, has become a priority. Youth groups and older workers were particularly affected in their career tracks and expectations.

It is desirable that the framework offered by the combination of employment, social security, education/training, and guidance systems can provide consistent and sustained career support, adjusted to each career stage. This support should be accessible in various contexts (learning, work, home), independent of their level of formalisation.

Not all countries in Europe have a structured approach to CMS development and those that do, tend to do it in the framework of general education services as a curriculum element (Denmark, France, Austria and Finland). Less frequent are initiatives aimed at working adults.

Independent of being part of a taught curriculum or developed with less conventional approaches, CMS can be either inserted in a homogeneous vision of people, originating a 'one size fits all' approach, or acknowledge individual needs and styles of learning, as well as client group specificities. This makes CMS development a pedagogic and andragogic issue, which has to adapt to age-related characteristics.

In the case of older workers, issues such as extensive professional experience and possible low proficiency in ICT tools and foreign languages need to be factored into the approaches developed. This type of approach requires identification of typical issues in each career stage and, at its best, assessment of individual needs.

Assessment strategies can be found in several countries, such as France, Austria, Portugal and the UK. In France, assessment is done via a portfolio of experiences (*Bilan de compétences senior*), which registers skills and acquired knowledge. This instrument is used, with adaptations, in all training and education branches and is available for application in enterprises via agreement between employers and employees. The portfolio approach not only generates critical information which can be carried across learning and work, but also encourages individual self-reflection. Typically, the portfolio approach will have a very strong component of CMS development and will induce targeted strategies to aid reflection about career planning, accounting for distinct career stages.

A similar approach has also been developed in Portugal, with particular priority given to failing enterprises undergoing restructuring. In this case, the portfolio approach serves the double purpose of generating worker adaptability, when facing change in a mature career stage, and of assuring the transmission and retention of organisation knowledge during restructuring.

Curriculum strategies for CMS development can be found in some countries, but generally target youth enrolled in the school system. It is more frequent that adults are engaged in mixed models which adopt an assessment strategy coupled with uniform curricula of activities aimed at developing skills in the areas identified as in need of intervention.

Prior identification of critical areas of skills development is sometimes used as strategy. The Scottish framework for career development identifies important issues for each stage of career development as well as critical activities and contexts for CMS acquisition.

The Portuguese framework adopts a similar strategy, also attempting to identify achievement levels in the development of sets of CMS, combining formative with summative assessment. The adopted framework is currently supporting the development of soft skills in adult education and validation procedures.

Within the employment sector, the most common approaches across Europe are ready-made programmes aimed at unemployed or at-risk groups, where people learn how to search for work, write a CV, use the internet and how to behave in an interview. These activities are increasingly popular. They are relatively easy to organise and tend to reduce time and financial effort, as they are developed in group sessions, with relatively short programmes.

These are, nevertheless, limited programmes which develop a reduced set of skills which might not respond to individual or group needs and which adopt a short-term vision of career development. In general, tailored approaches are more successful and tend to generate higher client satisfaction.

This uniform approach also tends to adopt the erroneous idea that people in need of guidance are in deficit, rather than in need to clarify and explore their potential. The idea that people who need to develop CMS are a problem to solve may drive policy to underestimate the human resource potential of individuals, by not differentiating them. Also, 'one size fits all' approaches carry the risk of demotivating participants, since they frequently do not respond to their needs.

Although assessment strategies are more time-consuming, they tend to be more rationalising. They try to ensure that the individuals will find satisfactory responses and will not permanently fail in labour market integration, and will not become permanent clients of support and benefit systems.

4.7. Conclusions

Based on the analysis as presented in this chapter, the following can be concluded:

- (a) perspectives in national policies have changed from early retirement to extending working life. This supports the establishment of active age management strategies, a relatively a new concept in many countries, not only in policy but also at employer level;
- (b) different definitions are used for active age management, and sometimes it has not been agreed what kind of specific activities fall under this description. Active age management policies are mostly focused on the unemployed and the older worker around retirement age;
- (c) there are few national policies or mandatory guidelines for active age management in workplaces (apart from the positive example of France). Active age management is mainly stimulated by financial incentives to employers and employees, the provision of self-help material by internet and handbooks, and promotion and awareness-raising campaigns;
- (d) although active age management policies have developed over the past decade, guidance is often not a specific focus in this very broad strategy development. Nonetheless, limited European comparative insights are available on the volume and composition of companies offering guidance and counselling activities for their workers, and more specific older workers;
- (e) career guidance strategies are established, but these are generally focused on young age cohorts (in schools) and the unemployed (employment centres) limiting access for older workers. The trend seems to be in the direction of the self-serving citizen. Much information is available and online support seems to be increasingly used for providing information and guidance, though difficult to use some target groups;

- (f) guidance provision is generally still fragmented (serving different target groups, decentralised, and delivered by public and private actors) and uneven in terms of accessibility, where the main (national) focus seems to be on the unemployed. There has generally been little coordination between sectors and between private and public sectors, but this has begun to change. Lifelong learning, career guidance, employment, and active age management policies should be better linked;
- (g) only a few countries have coherent guidance systems and commonly agreed quality standards for service delivery (Denmark, the UK, and partly in the Netherlands). Guidance at company level seems to be mostly a question of choice of whom they see as a good guidance practitioners or provision;
- (h) despite some initiatives trying to find evidence for guidance activities, there is currently no established method to follow up and evaluate its. The lack of evidence of the effects of active age management strategies leaves governments and employers uncertain about the benefits of career guidance;
- (i) only few countries have structured approaches to CMS development for employed adults. Most of these adopt a mix of formative assessment of experiences with a curriculum summative strategy of skills development;
- (j) although assessment strategies in CMS are more time-consuming, they are also more relevant for career development and account for individual needs, age group characteristics and career stage specificities. Nevertheless, the most common strategy for CMS development in the employment sector is the provision of uniform, limited training courses in very basic career skills.

CHAPTER 5.

Age management guidance at work

5.1. Introduction

The starting point for this chapter is the conceptual model, presented in Chapter 2 (please refer to Figure 1). This chapter deals with the organisational context in which guidance takes place in relation to the conceptual model. First it describes the rationale behind age management strategy, addressing the arguments why an organisation decides to establish an age management strategy (Section 5.2). Then, it addresses the types of approach to deal with the challenges of active ageing and how these can be embedded in the overall human resources policy. Section 5.3 describes how guidance activities are integrated in the age management strategies studied. Section 5.4 deals with the involvement of internal and external actors in the development and implementation of the age management strategy, their approach and guidance activities. Section 5.5 provides some conclusions and explores framework conditions at organisational level that stimulate the establishment and implementation of guidance activities for older workers.

5.2. Strategy and approach

5.2.1. Starting with strategy

Before focusing on the guidance element in age management, we analysed whether and why age management strategies and approaches have been implemented in the 20 cases studied. Assessing the active age strategy and approach provides the opportunity of shedding more light on the organisational context, to understand better the (potential) problems and challenges older workers face in the organisation and the choices organisations have made in combating these (potential) problems.

Table 5 presents the various background factors and rationales used when deciding to implement an age management strategy. It shows the name of the organisation, the background and aim of the strategy, an inventory of the cases on the most emerging rationales for developing age management policies: productivity, sick leave, culture, knowledge and retirement. (Complete information on the case studies can be found in Cedefop, 2015).

Table 5. Background and aim of the case studies

| Organisation | Background and aim of the strategy | Productivity | Sick leave | Culture | Knowledge | Retirement |
|--------------------------|---|--------------|------------|---------|-----------|------------|
| Enemærke og Petersen | The overall objective is to adopt an age management approach that improves and encourages senior employees (older than 55 years) to remain in active employment. From the company's perspective the age management approach is mainly designed to make it possible to maintain and use older employees' skills and experience. | X | | | X | |
| Eesti Energia | It became clear that the ageing workforce will become an obstacle for the company in the longer perspective and to maintain the company's sustainability, immediate action needed to be taken. This action was developing the age management strategy | X | | | X | |
| Frosta Sparbank | The manager of the organisation felt that it was necessary to retain qualified personnel and their knowledge fund within the company to bridge the skill gap in new recruits but also to safeguard knowledge within the bank. Initially the aim of the approach was to facilitate transfer of valuable knowledge from older experienced employees to new recruits. | | | | X | |
| Kiruna | The primary purpose of this project was to influence management strategies and working practices to reduce absenteeism and the cost of sick leave, especially among older employees within the municipality. The main goal was to change workplace culture within the organisation regarding older employees. The long-term aim was to ensure a skilled workforce where older, more experienced, employees continue working within the organisation. | X | X | X | | |
| Kronoberg County Council | The project stems from the insights into increased sick leave in the organisation, especially among employees aged over 55. The issue of rapidly increasing sick leave across the labour market was also a matter of great concern for the government at the time. The overall objective of the project was to adopt an age management approach by improving the ability of employees aged over 55 to stay at work and to create a positive attitude among management in relation to its own and other employees' ageing. | | X | X | | |
| Schumann Haustechnik | The approach addresses the problems: ageing workforce (80% of the technicians will soon be older than 35 years); high employee turnover (due to high physical and psychological burdens and low personal perspectives); unsuitable apprentices who soon leave the company. | X | | | | X |
| Wicke | To motivate an ageing workforce to stay within the company, by offering adequate workplaces as well as ensuring that important knowledge is not lost in cases of retirement, Wicke has begun to develop a process to cope with demographic change and accept the opportunities such a situation offers. | X | | | X | |

| Organisation | Background and aim of the strategy | Productivity | Sick leave | Culture | Knowledge | Retirement |
|---------------------------------|--|--------------|------------|---------|-----------|------------|
| Rabobank | This strategy started with (older) employees that felt the need to exploit better their experience and secure their knowledge for the organisation before retirement. This feeling was further stimulated by the fact that the workforce within the Rabobank is aging because of a lower supply of young workers and because of the increase in retirement age to 67 years. | | | | X | |
| Achmea | During a company downsize in 2009-10 Achmea wondered how to deal with older employees. On the one hand there was the idea to lay off employees – in particular older workers – who had become redundant. On the other hand, in the light of future shortages in the labour market, Achmea felt the need to extend the working life of older employees and to exploit their knowledge. Following the latter course, the Silver Pool was born. | | | | X | |
| UCLH | The aim of the strategy is to provide guidance for staff approaching retirement age and highlights services available within the organisation to support the transition towards retirement, and encourage staff to prepare for their retirement at an early stage; to use the support and advice available and to explore the various options open to them. | X | | | | X |
| Czech Society for Quality (CSQ) | The approach was not introduced to meet an immediate need, but following an offer from the Association of Adult Education Institutions to participate in a project on age management. CSQ saw it as an opportunity to analyse the situation of its employment structure and to evaluate the organisational directives concerning human resources management. | | | | | X |
| Vysočina | The strategy was not developed to meet an immediate need. It was seen as an opportunity to conduct a thorough analysis of the human resources management practices. | | | | | X |
| Makro | The approach is a result of the orientation towards employee development, maintaining a stable market position, increasing effectiveness, minimising the threat of employee fluctuation and maximising chances for successful recruitment of new staff in periods of intensive growth. It also addresses future challenges of the local labour market related to the aging population of Poland, as well as a dynamic process of outflow of labour forces from the region. | | | | X | |
| Zemat | This approach is conditioned by the fact that the local labour market offers almost no alternative. There are few candidates available that could bring in the required competences to the organisation. In practice, the approach focuses on the development of sustainable relations with its employees and is oriented towards lasting cooperation with its ageing workers while promoting possibilities for their development and more effective use of their potential. | X | | | | |
| Paloma | The general aim of the approach is to transfer knowledge from older workers to younger ones. With such an approach the company wants to employ older workers longer and also shorten the learning process of younger workers who have no practical knowledge or experiences in a particular working place. | | | | X | |

| Organisation | Background and aim of the strategy | Productivity | Sick leave | Culture | Knowledge | Retirement |
|---------------------------------------|---|--------------|------------|---------|-----------|------------|
| Crédit Industriel et Commercial (CIC) | The strategy was first developed to comply with legal developments and with their consequences. In particular, the <i>accord seniors</i> approach of the CIC has two main objectives: planning the latter part of an employees' career and the anticipation of retirement; and transmission of seniors' experience, skills and methods to younger employees. | | | | | X |
| Groupama | The goal of Groupama d'Oc was to shift the average retirement age of its employees back towards age 60, as required by French laws. The overall objective is to manage better the latter stages of a career while anticipating future retirements. | | | | | X |
| Rossimoda | Several factors have led to insufficient skills' reproduction which does not match the industrial district's skill needs, jeopardising the long-term sustainability of the district. One consequence is the widespread practice of workers who continue to work after their retirement age, usually at 53-55 years. The strategy implemented is aimed at the formalisation of existing job-related knowledge and the transfer of these specific skills and job-related tacit knowledge. | | | | X | |
| Glual | The overall objective of the strategy is to ensure that the company keeps experienced workers' knowledge within the organisation. The idea is that the company does not lose all the knowledge, experience, etc., that qualified experts have accumulated during the long period they have worked for the company. | | | | X | |
| Firefighting Service of Zaragoza | The main reason why the approach was developed lies in the hard and strenuous working conditions that firemen experience and the physical limitations experienced by workers as they become older. The organisation has an increasing number of posts in the auxiliary services section, and it is more convenient to cover these posts with workers who have health/physical limitations. | X | | | | |

Source: Authors, based on Cedefop (2015).

Keeping older workers active and productive is the most important central theme among most age management policies. This is the result of a development in the age composition of the population, not just within companies but also at industrial, national and EU level. This is what binds most cases together.

As can be seen in Table 5, the urge to develop an age management strategy is, in most cases, the result of (foreseen) challenges relating to productivity, sick leave, organisation culture and knowledge.

A productive workforce is important for any company and sector (public and private, profit and non-profit). If the management of an organisation sees challenges to productivity, age management can be a solution. This is the case, for example, in Schumann Haustechnik. This organisation faced enormous challenges due to the ageing workforce and high employee turnover because of high physical and psychological burdens and low career perspectives.

Productivity challenges can also be related to national policies which increase the pension age (as addressed in the previous chapter). Employers see that their own workforce also needs to work longer and to maintain a productive workforce they increase the attention paid to older employees through an age management strategy. This is an indirect effect of national policy on organisations, because the main aim of the policy is to increase the pension age and is not directly aimed at stimulating age management strategies.

Another recurring challenge companies can face is relatively high sick leave figures. The age management strategy at the Kronoberg County Council stems from increased sick leave in the organisation, especially among employees aged over 55. The issue of rapidly increasing sick leave in the entire labour market was also a matter of great concern for the government at the time.

Cases also address negative views about older employees in the organisation, for example regarding productivity. Policies have been developed that address these negative stereotypes, working on creating a culture in the organisation that values the input of older workers. A concrete example in this respect is the age management strategy at Kiruna, which aimed to change the culture in the organisation regarding the position of older employees in the workplace.

Some organisations also see the added value of older workers: they are skilled and have a good grasp of processes, so losing them to (early) retirement means losing skills that are needed. The timeframes in which the organisation foresees these problems differ. Some companies see these challenges when the problem is immediate, for example when an employee indicates that he wants to talk about early retirement (which was the situation at Glual). Others see the challenges of knowledge loss years before this situation is at hand (which was

the situation at Wicke). This is where human resource planning plays an important role but not all companies plan their human resource needs.

It is also good for employees to think about their working life and productivity later in life. An interesting statement from the case of Vysočina: 'Until the age of 40, you have a lot of family responsibilities related to your children. When you become 50, there comes the stage when a person takes care of their parents, which can be even more exhausting. I have never thought of leaving my job because of my age or potential loss of my work ability, but now I am seriously thinking about it because of the family issues related to my ageing parents'.

In some cases there are national developments that directly stimulate or compel an organisation to implement an age management strategy. Laws and regulations can make it mandatory to develop age management (this can be via binding laws) or stimulate the development of age management (this can be via providing funds and/or creating awareness with public information programmes). Such binding laws are a motivational factor in the cases in France (Crédit Industriel et Commercial and Groupama). The dimensions are not mutually exclusive; both are present in the policy in France (see also Chapter 3).

The goals of active age management policies, as described above, have a problem-orientated focus, with the strategy addressing a specific challenge, such as health problems, negative stereotypes, disappearance of competence, integration of workers' experience. This appears to be the case in many situations, but not always.

Two companies (CSQ and Vysočina) have developed an age management strategy without any kind of problem at hand. In these cases the organisation either sees it as their own responsibility to develop an age management strategy, or because of another opportunity that results in the development of the strategy. At the Czech Society for Quality (CSQ) a strategy was introduced based on an offer from the Association of Adult Education Institutions who asked CSQ to participate in a project on age management.

Nevertheless, the problem-orientated focus is an important aspect of the normative element in age management and discussion of what age management is or can be. It also implies that, in most situations, age management is reactive: a problem occurs (or is perceived as going to occur) and policy is developed and implemented to deal with the problem at hand.

5.2.2. From strategy to approach

Once a company has laid down the aims for the age management strategy, the next step is to specify the approach. Instruments are selected for implementation

to realise the set of aims; guidance is an integrated factor. Before going into the guidance aspect in Section 5.3, we will first look at the approaches themselves.

Table 6 shows the different approaches used in the case studies. The approaches most often used are training and lifelong learning and career development. If career development programmes are in place, these often include mentorship activities, where a senior employee is linked up with a more junior employee. The mentorship activities at Makro offer possibilities for senior employees to take a new step in their career within the organisation.

Two specific training and lifelong learning activities are found in the cases. First, the activities can be aimed at job-related skills such as the training provided at Schumann Haustechnik, to update skills on new technologies, materials and working methods.

However, there are also cases where the training is linked to the professional development of the individual (development of CMS); career and professional development at UCLH is concrete example, encompassing career development planning and application training. Training and lifelong learning and career development are not the only two approaches used; others are described after Table 6.

Table 6. Implemented approaches per case

| Organisation name | Job recruitment | Training and lifelong learning | Career development | Flexible working time practices | Health protection and promotion, and workplace design | Redeployment | Employment exit and transition to retirement | Comprehensive approaches |
|---------------------------------------|-----------------|--------------------------------|--------------------|---------------------------------|---|--------------|--|--------------------------|
| Enemærke og Petersen | | | X | X | X | | X | |
| Eesti Energia | | X | X | X | | | | X |
| Frosta Sparbank | | | X | | | | | |
| Kiruna | | X | X | | | | | |
| Kronoberg County Council | | X | X | | | | | X |
| Schumann Haustechnik | | X | X | | | | | |
| Wicke | | | X | | X | | | |
| Achmea | | | | | | X | | |
| Rabobank | | X | | | | | | |
| UCLH | | X | X | X | | | X | |
| Czech Society for Quality (CSQ) | | X | X | X | | | | |
| Vysočina | | | | | X | | | X |
| Makro | | | X | X | | | | |
| Zemat | | | X | | | | | |
| Paloma | | | X | | | | | |
| Crédit Industriel et Commercial (CIC) | X | X | X | X | | | X | |
| Groupama | X | X | | | | | X | |
| Rossimoda | | | X | | | | | |
| Glual | | | X | X | X | | | |
| Firefighting Service of Zaragoza | | | X | | | X | | |
| Total | 2 | 9 | 16 | 7 | 4 | 2 | 4 | 3 |

Source: Authors, based on Cedefop (2015).

In Table 6, job recruitment only shows up in two cases in France, where the law is a driving factor behind the strategy. Laws can be a stimulus in the development of a specific approach that organisations otherwise might not see as part of age management.

Flexible working time practices include adapting or reducing the workload of older employees. Seven cases have this type of approach in their age management strategy and, in most, the approach is straightforward: older employees have the opportunity to rearrange or reduce their working hours. The case of Eesti Energia offers a variation with 'shared jobs' where older employees are offered shorter and flexible (part-time) working hours. Parallel to this, trainees are recruited who can compensate for the reduction in hours of the older employee. Further, the senior employee works together with the trainee to provide on-the-job training.

Health protection and promotion, and workplace design can be the subject of promotion activities specifically aimed at the older employee. These activities are sometimes, as in the case of Enemærke og Petersen, combined with health checks (annually/every five years) and a discount membership at a fitness centre. Guidance in these situations aims at promoting and helping employees in creating a healthy (work)life.

Approaches aimed at employment exit and the transition to retirement are organised in the form of courses and meetings on the consequences of retirement. Subjects covered include the effects of retirement on income and lifestyle and the transition from the labour market to retirement. Guidance activities developed in these approaches consist of informing and advising employees about the transition.

There is a link between the aims of the strategy and the approaches implemented to reach these aims. For example, if older employees have important skills for the organisation, then the transfer of these skills via a mentorship programme is a logical approach.

Career development methodologies and guidance activities are used for a wide range of aims. One approach can address several aims, even though only one aspect is being targeted. An example is the diversity of aims and effects of mentorship programmes: they can help lowering sick leave and create a positive attitude towards older employees, which were the aims in the case of the Kronoberg County Council. A mentorship programme can also be used as a stimulus for knowledge transfer, which is the aim at Glual.

Though the aim is mainly driven by one or more challenges, such as knowledge loss or a high sick leave, sometimes a more comprehensive approach is chosen as with Kronoberg County Council, Vysočina, and Eesti Energia. For

example, in Eesti Energia (Estonia) the active age management measures were chosen after careful consideration and research of best practices that companies with similar profiles have implemented in other countries. The company also organised a study tour to a company in Sweden for inspiration.

5.2.3. Embedding in an overall human resources strategy

In almost all cases the age management strategy is embedded in the overall human resources policy of the organisation. This is done through formal policy (written in a human resources strategy) or it is incorporated in the work process of the organisation (without being laid down in formal policy). A few cases, however, report on developments in age management in a situation where age has no specific place in the human resources strategy.

In the Rabobank (the Netherlands) example older employees created the approach themselves. They felt the need to talk to each other about how to ensure they would keep enjoying their work in the future. This led to the creation of a community where they, and other employees wishing to join, could talk among themselves about this subject. Although the human resources department was enthusiastic about this bottom-up approach, they finally decided not to incorporate this community in the HR strategy of the organisation.

Vysočina, Czech Society for Quality (CSQ) and Groupama noted that extra attention was paid to the 'non-discrimination' objective laid down by law. The HR strategy must not conflict with these objectives (more about the national systems regarding this subject can be found in Chapter 3).

An age management strategy focused on older employees can also result in positive effects for other groups of employees. At the Frosta Sparbank (Sweden) the aim of the approach was initially to aid transfer of valuable knowledge from older experienced employees to new recruits. However the aim became twofold when the approach not only safeguarded knowledge within the organisation but also strengthened employees both professionally and personally. The approach evolved into an internal mentorship programme within the bank, suggesting that introducing an age management strategy can stimulate the further development of the overall human resources policy of an organisation.

5.3. Including guidance

5.3.1. Guidance for older workers and others

The definition of 'older employee' is very diverse in the 20 cases studied and can be 45+, 55+ and in some cases even 65+. The line for defining older employees

is subjective and diverse not only among countries but also among organisations. Enemærke og Petersen offers regular health checks to employees older than 45 and 'senior conversations' and 'annual senior conferences' are offered to employees older than 55.

In some cases, older employees are not the only target group of the age management strategy. Management engagement can be important, especially when it needs to:

- (a) be informed and advised about the age management strategy;
- (b) be trained in the instruments to be used;
- (c) change its own (negative) perception of older employees.

Younger workers can also be targeted by age management strategies, either because the firm has a lifelong career development perspective for its employees or because it aids knowledge transmission from more experienced, older workers to younger colleagues. Guidance activities aimed at younger employees can help them in:

- (a) changing their perception of age in the workplace;
- (b) their own career development possibilities;
- (c) learning the job at a faster pace;
- (d) finding better ways of cooperating with older employees.

Mentorship programmes are an example of policy where older and younger employees are both targeted by the same approach.

5.3.2. Guidance activities

The many potential guidance activities can be seen in the table below which summarises those identified in the case studies and classifies them by frequency:

- (a) used very often (found in 15 to 20 case studies);
- (b) often used (found in 10 to 15 case studies);
- (c) limited use (found in 5 to 10 case studies);
- (d) very limited use (found in zero to five case studies).

Table 7. Presence of guidance activities in cases

| Used very often | Often used | Limited use | Very limited use |
|--|--------------------------|--|------------------------------------|
| signposting informing counselling mentoring innovation/system change | advising feeding back | teaching/training assessing following up managing | sampling enabling advocating |

Source: Authors, based on Cedefop (2015).

All cases have introduced an age management strategy, have used guidance in implementing the strategy, and have embedded it in their (written) human resources policy or work process. All can be seen as a form of innovation and system change, the possible exception being Rabobank, where the community created by employees themselves is not formally embedded in the human resources policy of the organisation. However, management informally supports the initiative and the community has access to resources of the organisation, such as the Rabobank intranet, so this case is also categorised as an innovative change.

Signposting and informing are the most common guidance activities found in the case studies; in all except one, employees are informed about the age management strategy. This is a necessary first step, especially when the strategy has recently been introduced in the organisation.

This is an overarching type of guidance, aimed at promoting opportunities for older employees. Eesti Energia is an exception, in which the management consciously decided not to inform employees about the specific age management strategy for fear of a negative response from staff. The management worried that its actions might be seen as confirming stereotypes of older employees and giving them the feeling that they were redundant.

Counselling activities can be found in several case studies, although with relatively unstructured approaches. These activities are referred to as 'talks' or 'conversations' with direct supervisors or members of management, aiming at shared reflection on the employee's career and its development possibilities. Although close to conventional counselling sessions in some ways, these reflexive exercises are not clearly supported by a theoretical counselling framework or by specialised staff (although reference is made to counselling training and the presence of consultants). It is also not always clear if these conversations have a fully voluntary and open character. Interesting examples are the 'individual interviews about latter career stages' at Crédit Industriel et Commercial (CIC), the 'senior conversations' at Enemærke og Petersen or the 'career guidance meetings at 55' at Kronoberg County Council.

Mentoring activities can frequently be found, although not necessarily being aimed at offering support to older employees to help them overcome personal barriers. Often mentoring programmes are aimed at increasing productivity and knowledge sharing between generations. When correctly implemented (under ethical practice) mentoring activities increase the productive contribution of all workers and enhance the professional and personal roles of both age groups in a personally rewarding way.

When older employees are informed about the active ageing opportunities, the next step in the process is to help them interpret the information: this is advising, which is used less than signposting and informing. This is because there are age management strategies that rely on the initiative of the employee (self-help), so that the employee can decide what kind of approach suits him best.

The advising activities presented in the case studies are mainly aimed at helping employees to understand the opportunities created in the age management strategy and their relevance. The following subjects are part of advising activities:

- (a) helping older employees get a better grasp of the effects of retirement, for example on their income (as in UCLH in the UK);
- (b) helping older employees in understanding the relevance and opportunities of knowledge transfer an (important aspect of the mentorship programmes featured);
- (c) helping older employees create a healthy lifestyle (as, partly, in Enemærke og Petersen);
- (d) helping older employees work on their CMS (as at the career centre at the Kronoberg County Council).

Teaching and training activities are found in nine cases. In most these are job-related, apart from UCLH where they aim at teaching CMS.

Assessing is also limited in the cases but is done in three situations:

- (a) in teaching and training activities, to be used as input for defining training possibilities (as in Kronoberg County Council and the Crédit Industriel et Commercial);
- (b) in mentor programmes, to assess the skills of the older employee to be transferred (as in Rossimoda);
- (c) as part of a personal development plan in which the current skill level and ambitions of the employee are laid down, and can be used for an employee and his direct supervisor to monitor the development of the employee (the most interesting examples of this are the Czech Society for Quality and Achmea).

The presence of sampling, enabling and advocating in the case studies is limited; only the community of (older) employees created at the Rabobank are involved in advocating. The formal objectives of the community Wij(s) Rabo are:

- (a) promote the employability and the effective redeployment of older employees within Rabobank;
- (b) enforce and promote knowledge and experience transfer, including coaching and mentoring, especially for junior staff within Rabobank;

- (c) being the voice of older employees to the various stakeholders and interest platforms;
- (d) contribute to the range of measures within Rabobank aimed at the older employees.

5.4. Actors involved

This section deals with the different actors involved in age management strategy. These actors can be divided in two categories: internal parties and external parties. Internal parties are the direct supervisor/line manager of an older employee, the human resources department and, in some cases, other employees (peers of the older employee and younger employees).

Partnerships with external parties can be further divided into two categories: governance partners and resource partners. Governance partners are involved at strategic level, advising the organisation about the overall framework and conditions regarding for the strategy. Resource partners work at operational level, providing the resources (funding, guidance) needed in implementing the age management strategy.

Table 8 shows the role of the external actors involved in the different cases. Some 10 cases report on the involvement of one or more external actors, the other 10 do not. A small group of cases scores high in the involvement of external parties on several subjects; eight cases have external parties as governance and as resource partners.

In the following section we examine how internal and external actors are involved in financing, development and providing guidance.

5.4.1. Guidance providers

In the case studies, internal actors are the most important providers of guidance. In all, a manager from the organisation provides guidance while, in most, the direct supervisor/line manager of the (older) employee is the person providing guidance activities alongside their management tasks.

This is usually done during formal appraisal talks, career development talks or informally on-the-job. Most of the time it includes activities such as informing, advising and coaching. The same people provide information on the active age management policies of the organisation and the direct supervisor can play an important role in guiding the employee when they need to change jobs and are redeployed.

Table 8. Presence of external actors in the case studies

| Name organisation | Governance partners involved in the development | Resource partners | | |
|---------------------------------------|---|-------------------------------|---|--|
| | | (Co)Financing the development | At start-up involved as guidance provider | Structurally involved as guidance provider |
| Enemærke og Petersen | X | | | X |
| Eesti Energia | | | | |
| Frosta Sparbank | | | | |
| Kiruna | X | X | X | |
| Kronoberg County Council | X | X | X | X |
| Schumann Haustechnik | X | X | X | |
| Wicke | X | X | X | |
| Achmea | | | | |
| Rabobank | | | | |
| UCLH | | | | X |
| Czech Society for Quality (CSQ) | X | X | X | |
| Vysočina | X | X | | X |
| Makro | | | | |
| Zemat | | | X | |
| Paloma | | | | |
| Crédit Industriel et Commercial (CIC) | | | | |
| Groupama | | | | |
| Rossimoda | X | X | X | |
| Glual | | | | |
| Firefighting Service of Zaragoza | | | | |
| Total | 8 | 7 | 7 | 4 |

Source: Authors, based on Cedefop (2015).

This is the case at the Firefighting Service of Zaragoza (Spain). Guidance activities consist of interviews and discussions to assess older workers' skills and interests and inform them about the redeployment process and occupational options in the auxiliary services unit. Once an insight into the workers' competences and needs is gained they can be matched with vacancies the older worker's professional career continued.

Human resources professionals are other internal actors involved, though not all organisations have a human resources department. It is a privilege of larger organisations such as the Crédit Industriel et Commercial (France) where, each year, the department informs employees older than 45 about the possibility to meet with a human resources manager. Employees can either choose to ask directly for an interview, to delay the interview, or not to contact the department.

During the interviews, employees can request different types of activity: training, mentoring, information on retirement, specific organisation of work time.

Other employees from the organisation, peers and younger employees, can also be as described internal actors. Peers can provide guidance, as do the older employees at Rabobank. In some cases younger employees provide guidance, mainly in mentorship programmes, where both parties learn from each other by working together and talking about the job at hand.

In 10 of the 20 cases extra attention is paid to the internal guidance provider in the form of an internal or external training. In the remaining cases the competences of the internal guidance providers are most likely seen as appropriate to the extent that specific training on guidance methods is not deemed relevant.

5.4.2. Governance partners

Governance partners help in developing the age management strategy. In eight cases the organisation received external help during the process.

External experts may perform this role and may come from a consulting or (semi-)public organisation (university or public employment agency). They have relevant knowledge and help the organisation in designing the strategy, the approach and in selecting the guidance methodologies.

Representative organisations (such as union or employers' organisation) may also be a governance partner. These have close ties with the organisation, or sector, and may assist in developing the age management strategy. In Vysočina, the trade union played an active role in designing the strategy and approach in meetings with management. Governance partners may also supply their expertise in the form of guidance in their role as an expert on specific subjects. This makes them a resource partner.

5.4.3. Resource partners

Resource partners provide (part of) the resources needed to implement the age management strategy, such as funding and guidance delivery. They are involved on a more operational level than governance partners.

These are external partners that may (partly) fund the age management strategy. Most strategies in the case studies are fully funded by the company themselves but external funds played a role in seven cases:

- (a) EU funds such as ESF, EQUAL and the Leonardo da Vinci programme, when applicable (Wicke, the Czech Society for Quality and Vysočina);
- (b) national funds that help stimulate specific areas (partly/completely) overlapping with the goals of the age management strategy (Kiruna and the Kronoberg County Council);

- (c) industrial funds that help stimulate specific areas (partly/completely) overlapping with the goals of the age management strategy, which can be laid down in collective labour agreements (such as the intersectoral bipartite fund, Fondimpresa, used by Rossimoda).

A governance partner can also be involved as a guidance provider. These are organisations such as trade unions, employer organisations, public employment services (PES), adult learning centres, external experts. Although internal actors provide most career guidance in the case studies, some report on the use of external sources, mainly private consultants, trainers and public employment services. For example, employees at the UCLH (the UK) have the opportunity to make an appointment with their pension provider to talk about the consequences of retirement on their income.

Different actors may work together, as at the career and counselling centre of Kronoberg where employees are informed about occupation paths for older workers. Similar to the learning centre, the career and counselling centre is a physical space and here employees receive counselling and advice from education advisors, the public employment service, the social insurance agency and the county council.

Such guidance activities enable employees to become better informed about different career paths. It is difficult to assess the skills of these external guidance providers and it is left to the hiring organisation to ensure their skills are appropriate.

Comprehensive cooperation is not seen in many cases. Internal actors are usually responsible for the guidance provided and the roles of external parties are more often in education and training, frequently on an *ad hoc* basis instead of being embedded in the approach. As seen from Table 8, most guidance provided by external parties is during start-up.

5.5. Concluding

Some conclusions can be drawn on stimulating or hampering guidance activities for older workers in the workplace floor:

- (a) keeping older workers active and productive is considered by promoters the most important aim for implementing an age management strategy, approach and guidance. There is a strong link between the challenges that the age management strategy addresses and the approaches implemented. However, one approach can help in dealing with more than one challenge so

- the same approach, for example a mentorship programme, can be used in different cases with different challenges;
- (b) another important challenge is retention of knowledge. Having information about staff numbers, their competences and potential development is an important stimulus for organisations in developing an age management strategy;
 - (c) laws and regulations can be stimuli to age management strategies in organisations; they may also stimulate the development of approaches that otherwise might be overlooked by organisations;
 - (d) age management strategies seem to have a problem-oriented focus. The strategies seen in most case-studies address a specific challenge, such as health problems, negative stereotypes, disappearance of competence, integration of worker experience;
 - (e) signposting and informing are often mentioned as guidance activities in the age management strategies. A negative perception of older employees in the organisation regarding can be a problem in signposting and informing, seemingly confirming the negative view. Advising is less often present in the case studies because some strategies rely on the initiative of the employee, assuming that the available information is enough for the employee to choose what kind of approach suits best;
 - (f) half of the cases make use of an external partner (governance and resource partner). Organisations that make use of external partners tend to involve them on several subjects (they most likely have governance and resource partners).

CHAPTER 6.

Age management guidance delivery

6.1. Introduction

This chapter describes the guidance process in more detail. Where the previous chapter focused on 'what', the available guidance instruments in strategic context, this chapter focuses on 'how' and 'why', the methods used to obtain and provide guidance.

Section 6.2 looks at the start of the process: who can participate, what is done to come to a selection of specific forms of guidance and why is this part of the process structured as it is. The actual delivery of guidance is described along the same lines: who benefits from guidance activities, what are the relevant characteristics (level, methods, channels, quality control) and why are employees engaged (having in consideration if participation in guidance activities is voluntary, imposed or suggested by management). This main part of the process is described in Section 6.3. It is followed by a concluding section (6.4).

6.2. Start-up stage

This section deals with the start-up stage of the guidance process. From the start, guidance can be linked to a specific moment in time or to a specific person. A variety of dimensions/characteristics is relevant.

6.2.1. Who participates in the start-up stage?

This will be described using several dimensions, also shown in Table 9. The following dimensions are used to describe who participates:

- (a) entitlement and/or obligation: who is entitled or obliged to participate? When and by whom is such a selection made (if any)? Participation can have a low or high level of obligation;
- (b) actors involved (apart from the employee(s): are there internal and/or external actors involved?
- (c) the level/method of organisation: is this stage undertaken at an individual level, standard or customised, or is it a group process?
- (d) starting the activities: is it linked to a person or a moment in time?

Table 9. Presence of external actors in cases

| Name organisation | Obligation level: | | | Actors: | | Level/method: | | | Linked to: | |
|---------------------------------------|-------------------|--------|------|----------|----------|---------------|-------|---------|----------------|--------|
| | low | medium | high | internal | external | one-on-one | group | IT-tool | moment in time | person |
| Enemærke og Petersen | X | | | X | X | X | X | | X | |
| Eesti Energia | X | | X | X | | X | X | | X | X |
| Frosta Sparbank | | X | | X | | X | | | X | |
| Kiruna | | X | | X | X | X | | | X | |
| Kronoberg County Council | X | X | X | X | X | X | | X | X | |
| Schumann Haustechnik | | | X | X | X | X | X | | X | X |
| Wicke | | X | | X | X | X | | X | X | |
| Achmea | | | X | X | | X | | | | X |
| Rabobank | X | | | X | | | X | X | X | |
| UCLH | X | X | | X | X | X | X | | X | |
| Czech Society for Quality (CSQ) | | X | | X | X | X | X | | X | |
| Vysočina | X | X | | X | | X | X | | X | |
| Makro | | X | | X | | X | | | X | |
| Zemat | | X | | X | X | X | X | | X | |
| Paloma | | | X | X | | X | X | | X | |
| Crédit Industriel et Commercial (CIC) | X | | | X | | X | | | X | |
| Groupama | X | | | X | | X | X | | X | |
| Rossimoda | X | | | X | X | X | X | X | X | |
| Glual | | | X | X | | X | | | | X |
| Firefighting Service of Zaragoza | | X | X | X | | X | | | X | |

Source: Authors, based on Cedefop (2015).

Guidance is mostly linked to a specific moment in time. Large organisations with a more formal structure are likely to have a selection process for age-related guidance embedded in the age management strategy. When an employee reaches a certain age, additional guidance is offered within the context of generic human resources instruments. The level of communication between the employee and the direct supervisor stays the same, but specific emphasis is placed on the last stage of the professional careers of all older employees.

Another dimension of involvement is the degree of employee participation obligation. Some approaches are compulsory. This more directive orientation of guidance is linked to a specific person: that person is identified and seen by the management as someone who requires (or is entitled to) additional guidance. This is the case for several of the mentoring projects among the case studies, though the practice is not so prevalent as the link to a specific moment in time.

In some situations, an individual is labelled as someone who has much knowledge that must be transferred to ensure that the organisation does not suffer a knowledge gap when that individual retires. This sounds more directive than it is. For this kind of approach to work, extra attention must be paid to stimulating the individual to participate; such programmes require a high participation of relevant older employees.

In smaller organisations, processes are generally less formal and institutionalised. Age-related guidance is customised at the initiative of either employee or manager. Such non-formalised start-up guidance stages also occur in large organisations because of the influence of the organisation culture. When an organisation has a less formalised way of working and has a less hierarchical structure, a more informal approach is often used in age management strategy. In these less formal approaches there seems to be more room for customisation.

6.2.2. The start-up stage of guidance

The activities performed during the start-up stage often are a form of guidance in themselves. The following dimensions play a role here:

- (a) the level of organisation: is this stage undertaken at individual level, standard or customised, or is it a group process?
- (b) employee involvement in the start-up stage;
- (c) the channel that is used: examples are face-to-face communication, visits to information and guidance centres, online services;
- (d) providers of the guidance in the start-up stage;
- (e) incentives for participation.

Some cases involve a two-step approach to the guidance process:

- (a) the first step is part of the start-up stage. The usual guidance instruments applied here are informing and advising; all employees are informed and/or advised about the possibilities in the age management strategy. These activities are most non-mandatory;
- (b) a more demanding and intensive programme can follow. It is up to the employee to decide whether they want to receive more intensive forms of guidance in this second step.

The first step does not necessarily consist of a thorough identification of needs. Usually, direct supervisors will have made an initial identification of needs after superficial exploratory conversations with employees. In most cases, skills assessment and any intensive form of guidance, when available, occur on the initiative of the employee himself.

A good example is the case of Crédit Industriel, where the employee is informed about the possibilities, but it is up to individuals to ask for more specific guidance on skills assessments, training, mentoring (via the human resources department). In most cases, all older employees have access to the more intensive and demanding programme.

The direct supervisor is normally the provider of guidance during the start-up stage, on an individual level. An exception is the case of Enemærke og Petersen where information and advising sessions are developed at group level, while coaching and mentoring are developed at individual level. In these collective information sessions, the employees are informed about the available career opportunities. They are also advised on how to interpret available information and choose the best possible solution. After this, the employee has the opportunity to have a conversation with their manager to discuss their thoughts and plans for the future.

The organisations analysed in the case studies paid limited attention to incentives for employees to participate or seek out guidance. Only two introduced a financial incentive to stimulate participation:

- (a) Eesti Energia (Estonia) offers 10% of salary in return for participation in a mentoring programme and on-site training. Usually paid for the period of mentoring or training, it is part of the performance pay given at the end of the year.
- (b) Zemat (Poland) introduced a new function for older employees who, when up-skilled to this function, would be eligible for a task-based financial incentive. In this incentive, a periodic bonus is calculated using a combination of different parameters related to performance.

In other cases the incentives to participate are the potential benefits of the activities. The activities always have something to offer to the employees, as in

learning new skills; this added-value for the employee is usually seen as enough incentive for employees to participate.

6.3. Guidance delivery

In this section the methods used to deliver (and obtain) guidance are discussed. The same distinction as above – who, what, why – is used.

6.3.1. Who participates in the delivery stage?

This section examines the following dimensions:

- (a) entitlement and/or obligation: who is entitled or obliged to participate, and when is such a selection made (if any)?
- (b) actors involved (apart from the employee(s)).

Some case studies require mandatory participation of selected employees. This can occur on both the delivery and the start-up stage. In most cases where the two-step approach is used, employee participation in the delivery stage is voluntary.

Cases can be classified according to the level of obligation:

- (a) low directive nature: the employee decides whether or not to participate;
- (b) medium directive nature: the employee and management jointly decide whether or not the employee will participate;
- (c) high directive nature: management decides which employees can participate.

Cases can also be classified according to the involvement required from the employee:

- (a) low involvement, where the required input of the employee is minimal (such as attending a lecture);
- (b) medium involvement, where some input is required from the employee (such as attending simple training over a couple of days);
- (c) high involvement, where the employee is required to commit time and effort and is very involved in the entire process (such as an intensive mentorship programme).

Table 10 shows an analysis of obligation level for guidance activities against the involvement required from the employee, with a direct relationship between both variables. When the level of obligation is low, the involvement required from the employee is low or medium in most situations; a higher level of obligation tends to carry a higher level of engagement. This is an unsurprising conclusion,

since if the enterprise management decides that an employee must participate, guidance activities are likely to be more intense.

Table 10. **Relation required involvement and obligation nature**

| | obligation level is: | | |
|--------------------------|----------------------|--------|------|
| Required involvement is: | low | medium | high |
| low | +++ | ++ | + |
| medium | +++ | ++ | + |
| high | + | ++ | +++ |

Source: Authors, based on Cedefop (2015).

Nevertheless a high level of obligation, does not necessarily mean that the employee cannot refuse to participate; it means they were nominated to do so, which may carry a certain level of personal pressure. Also, obligation does not imply that employees are unwilling to participate in the activities.

Another aspect is how the nature and content of activities is perceived as directive/prescriptive for future behaviours. Although participation may be voluntary, the contents of the activities may be perceived more as an empowering experience, or more as organisational traps which will result in behavioural or career development constraints.

The following comment from a Wicke's employee captures this fundamental aspect of the perception of the role of guidance interventions: 'When I got the chance to take over the higher position of my superior, who was about to retire, our personnel manager asked me if I would like to participate in the project. I gladly agreed, as this gave me the unique opportunity to get acquainted with my new tasks easily and to obtain knowledge from my superior in a well-structured and direct way. I was highly motivated to learn about the experiences of my superior with his tasks and his way of handling it. Although I was not obliged to then handle things in the same way, this was a good starting point for developing my own approach to dealing with the new job'.

When guidance is provided by internal parties, especially via the direct supervisor, there are no apparent quality measures in place other than the expected professionalism of the supervisor in question. Sometimes these managers are trained in implementing active age management in practice, but often they are not trained to provide guidance. The case studies also show that the talks between the direct supervisor and employee are mostly unstructured. This is especially the case in SMEs.

Kronoberg (Sweden) is one of the few cases where quality assurance was an important dimension. One of the approaches in Kronoberg was the formulation of a plan for manager training on issues such as age awareness and working

environment. This was prepared to ensure that the first part of the initiative would be implemented in everyday activities. During the initial phase, all managers had training in guidance activities, and guidelines were available.

6.3.2. What is done during the delivery stage?

In this section we discuss the various methods identified according to level of organisation, employee involvement, the channel used, providers and quality.

Face-to-face guidance is the most common channel to deliver guidance, especially informing, advising, coaching and mentoring. Most guidance is provided on an individual basis, via formal or informal talks between employee and direct supervisor.

Only in Kronoberg (Sweden), is guidance provided through a formalised training/guidance centre where any employee can come to receive assistance on specific subjects at individual level. Kronoberg set up local learning centres for workers.

The centres allow workers to pursue formal education or other training at their own pace. Employees can take part in online education programmes (e-learning) which make it possible to provide guidance in a different setting than face-to-face. The focus of these IT instruments is on the responsibility of the individual, complemented by direct support. Employees have the opportunity to receive counselling and support in pedagogical and administrative matters, and meet other students in similar situations.

In some cases, ICT supported self-services were used to guide the individual through the assessment of own skills, attitudes and aspirations. These services were also sometimes set up to support the organisation in assessment of competences and career aspirations at organisation level.

Wicke uses a specific ICT tool, the competence pilot (*Kompetenzpilot*), to support its age management strategy. This was developed in the framework of Nova.PE by an EQUAL development partnership, not to be used solely by Wicke, but for any organisation that implements Nova.PE. It is used to visualise indispensable competences according to areas and age groups, elaborate differentiated personal profiles for individuals, organise knowledge transfer processes, and detail transfer plans.

While ICT-tools can be seen as important in developing and disseminating career information and services, it is also widely recognised that face-to-face services, in the form of individual and/or group work, are an essential part of guidance delivery.

Guidance at group level is mainly relevant when informing plays a large role in the specific approach. A possible advantage of using groups is the use of

peers as actors in guidance delivery. In the cases studied, peer guidance was only found in settings where informing and some basic elements of teaching are present.

An example of this is the Rabobank, where the entire guidance process is developed and organised by employees themselves. Another form of peer guidance can be seen at Eesti Energia, where personal stories of exemplary older employees are collected during interviews and shared over the enterprise intranet. The purpose of this intervention is to show that Eesti Energia values all its employees, irrespective of age, and to set a positive example to other employees, older and younger.

Mentoring programmes were found in many case studies. In some, the mentoring programme is part of the general guidance structure. Two different methods are used:

- (a) a new employee is paired with a more experienced employee as part of the introduction programme;
- (b) every year several older employees have the opportunity to become a mentor for a less experienced employee to stimulate knowledge transfer within the organisation.

In some cases external actors provide guidance at individual or group level. Whenever guidance is provided by an external party, the employer does not seem to take any specific measures to ensure quality in guidance delivery. Quality can be an implicit factor that the hiring party looks for, but it is not explicit in the planning and decision process.

In most cases, an external guidance provider is involved during the introduction of the age management strategy. Such providers help the organisation in building the right skills and competences for further guidance activities within the organisation. Structurally involved external guidance providers were only found in large organisations.

None of the case studies had an explicit quality assurance framework for guidance. However, some aspects suggest quality:

- (a) an external actor (co)finances the development (and might therefore have explicit directives regarding the quality of the chosen strategy, approach and guidance);
- (b) an external actor/expert is involved in the development and implementation;
- (c) the basis for the approach is good practice or research, and quality is embedded in this good practice (without any specific quality requirements described);

- (d) there is a guideline/protocol available regarding the guidance (so that the guidance provider has a basic framework to work with in providing the guidance);
- (e) the external guidance provider is involved at start-up and/or structurally involved;
- (f) internal guidance is provided on a structural or temporary basis;
- (g) the internal guidance provider is internally or externally trained.

Table 11 shows how the case studies scored per indicator, with enterprises size indicated.

Training the internal guidance provider can be an important quality indicator. In Kronoberg (Sweden), all managers were given education and training in providing guidance activities during the initial phase. Guidelines and an implementation plan were also made available. The education courses and seminars for managers were first delivered by a consultancy company and focused primarily on age management in the broader sense. Specific guidance activities were then be set out by the heads of division. The actual providers of guidance to other employees were internal actors, primarily managers, who took part in activities such as seminars focused on leadership and age awareness (prejudices and workability among older workers). The seminars were led by consultants specialised in age management.

Table 11. **Presence of quality indicators in cases**

| Quality indicator | SME | large |
|--|------------|--------------|
| External actor is (co)financing the development | 3 | 4 |
| External actor is involved in the development and implementation | 3 | 4 |
| The basis for the approach is good practice or research | 2 | 4 |
| There is a guideline/protocol available | 2 | 8 |
| External guidance provider is: | | |
| • involved at start-up | 4 | 3 |
| • structurally involved | 0 | 2 |
| Internal guidance is provided: | | |
| • incidental | 3 | 2 |
| • structural | 3 | 12 |
| The internal guidance provider is trained: | | |
| • internal | 1 | 4 |
| • external | 2 | 3 |
| • not | 3 | 7 |
| Total of cases | 6 | 14 |

Source: Authors, based on Cedefop (2015).

Having external funds available is an incentive to provide guidance. In some cases the development of the age management strategy could start because of

the availability of an external fund (such as the ESF or a national or sector fund). Knowledge of a good practice can also be an incentive to start the development of an age management strategy.

6.3.2.1. *Which approach serves better each cultural context?*

There are differences across cases in the way guidance is embedded within the organisation and the policy of the organisation. A more formal and structural approach seems to ensure good embedding and a uniform approach that stimulates access for all employees. However, this may not always be a straightforward conclusion:

- (a) smaller organisations generally work on a more informal basis and do not employ human resources professionals who are able to set out a formal and structurally embedded approach;
- (b) even larger organisations may not have a formalised way of working (functions, procedures, roles).

This stresses the relevance of considering these factors trying to transfer a good example to another organisation. Striking a working balance between formal and informal policy is not easy. When guidance is developed in an overly informal manner or too problem-based, (other) problems might be overlooked.

Another relevant aspect is the impact of prevailing negative stereotypes about older workers. A negative attitude in the organisation toward older employees can be an obstacle in the implementation of an age management strategy. Because of this attitude towards them, older employees will be less motivated in seeking out guidance. If this negative attitude is not addressed, guidance instruments might not be as effectively implemented and accessible as desired.

The attitude change must be from a perspective that regards older workers as obsolete resources that need to compensate for their deficits, to valuable, knowledgeable and experienced people that can be brought to their full potential if correctly supported. Within this perspective, older workers are assets to the firm, with the capacity of giving a productive contribution that younger workers cannot yet achieve.

The importance of a positive attitude also reflects the role of guidance in general, as an individual-empowering process which simultaneously generates value-added for the firm.

Cultural aspects relate not only to the organisation but also to the national context. Most guidance approaches in age management, attribute a fundamental role to the individual, showing a concern for his/her needs and reserving a space for worker initiative.

Some countries have a harder entrepreneurial culture, more focused on the organisation and less on the individual. In such cases, guidance activities tend to play a much more instrumental role, in which the needs of the individual are secondary or absent. The national context and culture can be a barrier in implementing (guidance in) age management. This seems mostly to be an issue in the eastern EU Member States.

6.3.2.2. *Same strategy, different goal*

Some age management strategies have different goals but use the same guidance instruments and methods. This is a positive indication for the transferability of the activities. For example, a mentoring programme can be aimed at:

- (a) stimulating knowledge transfer;
- (b) offering career opportunities to older employees;
- (c) helping new employees in getting to know the company and the work process at a faster pace.

Most cases have only one of these goals as a central aim of the strategy, but all of them are reached. This shows the broad potential of one approach, and the possibility for positive unforeseen side effects of policy.

6.3.2.3. *Enabling and restrictive laws and structures*

Several specific national laws and structures have an effect on the transferability of practices. In many cases certain guidance activities may not be relevant or have little applicability.

For example, some cases have a programme aimed at informing and advising an employee about the process and income-effects of retirement. However, this type of activity is less relevant in countries where the pension scheme is simpler and the employees themselves can easily judge the effects. This type of information and advice is essentially beneficial in countries where the pension scheme is relatively complex.

In other cases, guidance activities are linked to the introduction of flexible working times for older employees. Some also use financial stimuli to promote participation in a specific programme. These types of activities and stimuli are not always allowed in other organisations or countries due to collective labour agreements which may prohibit or limit the introduction of flexible working arrangements or financial stimuli.

Some cases have a financial framework to fund training activities for individual employees. These are organised at national or sector level and funded by the government or by employers and employees who pay a certain

percentage of their wage (costs). These funds stimulate the use of training activities, for example the development and training funds in the Netherlands (see Chapter 3). Without these funds, financing the development and implementation of these activities can be a problem.

6.3.2.4. *The role of external actors*

The roles of the external actors as (co)financiers and/or as experts during development and implementation seem to be intertwined. If an external actor finances the activities, an expert is usually involved in the development and implementation. It seems likely that one of the criteria for getting external funding is that an external party is involved (and financed) to meet funding rules.

Knowledge developed by external agents may be used in the development of the strategy, approach and guidance instruments, without the direct participation of the external experts. Some cases have based their design of the strategy, approach and guidance instruments on available information about good practices on the subject. This can be an example from another organisation or in line with a leading expert on the matter at hand.

One example is the work ability index ⁽²⁶⁾, a tool developed in Finland and used in other companies and countries. This illustrates the relevance of knowledge sharing and disseminating knowledge to stimulate the development of age management strategies that have been shown to work. It also benefits the overall development of high quality age management (applying the lessons learnt).

6.4. Conclusions

Below are the conclusions on framework conditions for the delivery of guidance.

A two-step approach to guidance delivery seems to be favoured. Step one is to inform or advise all eligible employees about the opportunities in the age management strategy; larger organisations tend to use a group approach and some use dedicated ICT tools. It is then up to the employee to decide whether to adopt a more intensive approach that involves advising, coaching, mentoring or counselling. These activities are better delivered on an individual level, face-to-face.

Needs and skills assessments are normally not performed at the initial intervention stage.

⁽²⁶⁾ <http://www.ageingatwork.eu/?i=ageingatwork.en.tools.4> [accessed 27.3.2014].

Guidance delivery process management is usually in the hands of the management of the organisation (the direct supervisor or human resources department).

There are indications of a correlation between the required involvement of the employee in the provided guidance and the involvement of management. The more directive (more obligatory) the guidance process, the higher the required involvement of the employee. This can be explained by two factors: the intervention was tailored to a specific employee or group of employees with strategic interest for the firm, such as experienced employees who want to retire and have critical knowledge for the firm in which management has a very direct, active interest; the intervention has a high level of priority and therefore the process will automatically require a high involvement of the employee to reach the set aims (such as business continuity).

In most cases an internal actor, such as the direct supervisor of an (older) employee, provides guidance. In most situations limited attention is paid to assuring the skills of these internal guidance providers. It is presumed that the direct supervisor has the right skills set to perform guidance activities.

External actors can have different roles: joint financing or developer, or guidance provider. This role is usually temporary, often for a single intervention.

Quality monitoring and assessment of guidance activities does not generally receive explicit attention. Quality indicators are usually indirect, for example, in the form of hired external experts or the fact that the age management strategy is based on a good practice.

Guidance processes, including methods of delivery, seem to be transferable but demand a 'fit' between the chosen approach and the context and culture of the organisation. Some age management strategies have different goals, but use the same instruments and guidance activities, so one approach could be used in dealing with several different issues.

Laws and structures can be an important factor in the transferability of an approach and associated guidance interventions. A set of guidance activities which is successful in countries with a complex pension system might not be suited to countries where the system is less complex. The existence of financial incentives and structures can stimulate late career development support.

CHAPTER 7.

Outcomes from age management guidance

7.1. Introduction

This chapter focuses on the results and outcomes of guidance activities. Section 7.2 deals with the outcomes, results and impact of age management and associated guidance activities. Section 7.3 describes the key elements that contribute to the success of guidance activities. Section 7.4 will deal with the way age management strategies and guidance contribute to national policy priorities, laid down by the European Commission. Section 7.5 will conclude.

7.2. Outcomes, results and impact

When looking at the outcomes of age management strategies and guidance in such strategies, there are three levels of interest for this study:

- (a) individual level: outcomes and effects for employees;
- (b) organisational level: outcomes and effects for organisations (employers);
- (c) national level: outcomes and effects in society.

Figure 9 gives an overview of potential outcomes, results and impacts.

The outcomes of guidance activities observed in the case studies are described below, on each of these levels. The most frequently mentioned are:

- (a) job satisfaction of employees increases;
- (b) employees stay employed longer;
- (c) employees gain and transfer knowledge;
- (d) productivity of the organisation increases;
- (e) trend towards an inclusive culture;
- (f) positive (unplanned) side effects, such as the improvement of innovation processes.

Table 12 synthesises the outcomes described in the case studies.

Table 12. Frequently reported outcomes, results and impact

| Organisation | Job satisfaction increases | Employees are employed longer | Gaining and transferring knowledge | Productivity increases | Culture changes | Other side effects |
|---------------------------------------|----------------------------|-------------------------------|------------------------------------|------------------------|-----------------|--------------------|
| Enemærke og Petersen | X | X | | | X | |
| Eesti Energia | X | X | | | | |
| Frosta Sparbank | | X | | | | X |
| Kiruna | X | X | | | X | X |
| Kronoberg County Council | X | X | | | X | |
| Schumann Haustechnik | X | | | X | | X |
| Wicke | | | X | X | X | |
| Achmea | X | X | | | | X |
| Rabobank | X | | X | | X | |
| UCLH | X | | X | | X | |
| Czech Society for Quality (CSQ) | X | X | X | | X | |
| Vysočina | X | X | X | | X | |
| Makro | X | | X | X | | |
| Zemat | | X | X | X | | |
| Paloma | X | X | X | | | X |
| Crédit Industriel et Commercial (CIC) | | | X | | | |
| Groupama | | | X | | | |
| Rossimoda | X | | X | | | |
| Glual | X | X | X | | | |
| Firefighting Service of Zaragoza | X | | | X | | |

Source: Authors.

Figure 9. Total overview of the effects

| Individual level | Organisation level | National level |
|--|--|---|
| <ul style="list-style-type: none"> • increasing job satisfaction • staying longer in employment • increasing skills and competences • increasing health (mental/physical) • increasing career perspective | <ul style="list-style-type: none"> • attractive employer • skilled and productive workforce • costs reduction/prevention, by: <ul style="list-style-type: none"> - preventing severance pay - less hiring temporary external workers • productive workforce • increasing innovation • better work culture • stronger social capital • improving human resource policy | <ul style="list-style-type: none"> • stronger economy • strengthening the pension system • improving quality of life • reducing social security costs • better match between education and labour market • good examples and results inspire • other organisations and countries |

Source: Authors.

7.2.1.1. Individual level

The effects of guidance activities at individual level are the most direct, as seen in the case studies. The job satisfaction of the employees rises because of the age management strategy. They are more motivated than before, and more employees choose to stay in their jobs longer after the introduction of an age management approach.

Using guidance helps create a better environment where older employees are stimulated to use (and keep using) their unique skill set and to continue working as productively as possible before retirement (and in some cases after retirement). Career guidance stimulates older employees to work on their own employability, learning new skills and transferring expertise.

Another situation reported in some cases is the positive effect of guidance activities in reducing negative stereotypes of older employees. Paying specific attention to the importance of older employees in the workplace has a reported positive effect on the job satisfaction of those employees.

This effect of increasing job satisfaction is reportedly also reflected in hiring, with all employees treated equally, as seen in the statement from an employee in the Czech Society for Quality: 'I had lost my previous job and I was already over 50. Then I applied for job to CSQ and I participated in an open competition with another eight candidates who were mostly younger than me. And I was really amazed by the fair attitude where age played absolutely no role'.

This also means that working lives are being successfully lengthened, in a way that is mutually satisfactory for the firm and for workers. At Enemærke og Petersen (Denmark), the guidance and flexibility offered to the employees has

motivated several of the company's senior employees to stay in their jobs longer. This trend is seen in several cases.

When the guidance focuses strongly on the individual, effects can also be seen in the self-confidence of an older employee. With the right guidance activities, employees validate their own knowledge and skills and, at the same time, learn something new. In the case of a mentoring programme, younger colleagues gain more experience and can see their confidence increasing as well as their motivation to perform better as they learn from their more experienced colleagues.

Mentoring activities also help younger workers in setting their career paths and potential further education processes. By learning new skills and by sharing the experience of their older colleagues, they can reflect on what they would like to do in the future or what they do best. This shows the relevance of the creation of a lifespan approach, with a holistic understanding of the individual which stimulates contact and cooperation between generations.

7.2.1.2. *Organisation level*

At this level, there is an important link between the goals behind approaches used and the activities developed. Organisations are generally focused on targets, using guidance activities for a specific reason, and working toward reaching underlying goals. When looking at the cases, companies seem to be reaching their goals (see Chapter 3):

- (a) productivity is increasing/not lost;
- (b) the culture is changing;
- (c) knowledge is transferred within the organisations.

A strategic approach to these subjects, through an age management strategy, helps create a stable process of change; it might even speed up the process. One Wicke's employee commented: 'Although I have already been with the company for 15 years, I learned a lot of details that proved very useful later on. By just taking over the job without an assessment, getting acquainted with my new tasks would have been much harder and certainly taken longer than half a year.'

However, it is not always possible to make a direct link between the age management strategy, guidance activities, and the results. More variables than just the strategy itself affect the results, for instance other developments within the organisation or country. Nevertheless, age management does contribute to the realisation of the goals.

Age management strategies result in a higher level of social capital. Social capital is seen as the (economic/productive) benefits that relate to the (social)

relation between employees, and the (social) relation between employees and the organisation. The strategies confront older employees with a new attitude and policy which encourages them to work longer. The approach has a positive effect on the ability of the company to retain its present employees and also shows the relevance of a life-cycle/span perspective. By not focusing just on older employees but on linking generations, the social capital of the organisation is strengthened.

An age management strategy can have a long-term effect and impact in the organisation, as seen in the mentor programme at Fresta Sparbank. A follow-up study of the mentorship programme shows that several of the participant trainees in the mentor programme are currently in management positions within the bank and that the mentorship programme has improved their leadership qualities.

Guidance, and specifically the mentoring programmes, has an effect (both short-term and long-term) on the company as they keep the right competence and knowledge within the organisation. Mentoring programmes can also (potentially) transmit culture, stories and networks in the organisations, so increasing the social capital. By preventing the situation where older employees have retired, and there are not enough younger workers with necessary knowledge and experience to fill older workers' shoes, a positive effect is created for the organisation.

An increase in the involvement of older employees within the organisation also has a positive effect on its innovative capability, as seen in Schumann Haustechnik. The age management strategy has increased their range of products in terms of installations accessible to seniors and the disabled. Now, they are also selling sanitary solutions that better meet older clients' needs. This is an unexpected side effect of the creation of mixed-age teams and the mentorship programme.

Innovative processes also benefit from older workers' increased contribution when they regulate the admission of new processes, techniques and forms of organisation. By having a deeper, experiential understanding of organisations and activities, older workers can have the critical perspective needed for firms to adapt innovations just enough to fit their needs. Frequently, all that is needed to achieve such positive results is to assess the skills needs of older workers (to target technological skills) and seek formulas for their engagement in management decisions.

7.2.1.3. *National level*

Effects at individual and organisation level have an impact at national level. However, most companies give more priority to organisation goals than to

societal goals but trends set in motion on these levels have a positive effect on society as a whole and stimulate the economy in general. For example:

- (a) companies are working on age management and are combating negative perceptions about older employees;
- (b) guidance activities are being developed to help employees in their work and in being productive;
- (c) better cooperation and understanding between generations (inter-generational alliance);
- (d) transferring knowledge and redeployment keeps a company productive.

An age management approach can also help to deal with widespread concern over whether senior employees can continue to work in physically challenging labour. By giving senior employees the option of more flexible work with less physical strain, they can continue to work in conditions that are more suitable for them. An age management strategy helps senior employees to consider themselves a more accepted part of the company and also means that they are not exposed to a widespread attitude that they are not capable of performing their tasks.

The costs of unemployment of elder persons – and its effects on society – can be reduced by the age management strategy and accompanying guidance. This is especially so when the focus of the guidance is on career development. By training or retraining an older employee it is less likely that the employee will become redundant for the organisation; if this should happen, he/she is better equipped to find new work. An interesting effect is that a good example may inspire other companies in developing a comparable age management strategy. The measures at the Firefighting Service of Zaragoza (Spain) have been very well received among the members of the corps: both workers and trade union representatives regard it favourably and similar measures are being considered for other civil servants (such as policemen) of the same municipality.

Cooperation between different stakeholders has a positive effect on the matching of skills produced in schools/VET providers and universities and those required by the labour market. Higher levels of quality can be achieved in guidance activities by involving schools or universities in developing age management strategies and in the provision of training.

Through greater engagement, training and education providers can also get a more concrete and realistic assessment of the skills required in the workplace. They can use this experience to improve specific education programmes, as with Eesti Energia, which cooperates with the Tallinn University of Technology (TUT). Larger organisations tend to have better capacity (for example via a formal human resources department) to organise this process.

7.3. Key elements for success

There is a question of whether age management and guidance are always successfully implemented in an organisation. There are factors that limit potential success and potential outcomes. In most situations the key elements for success are linked to the size of the organisation:

- (a) time and money must be available for development and implementation;
- (b) activities must be entrenched and anchored in existing policy;
- (c) mutual trust is important;
- (d) (external) expertise is important for development and implementation;
- (e) the activities must fit in the organisation.

Important obstacles to success are time and money. In some cases the benefits do not outweigh the (short-term) additional costs, which can restrict the development of policy as a whole and also the hiring of the necessary (external) expertise. This hinders not only the initiation of these types of activities, but also the implementation process. Some cases had to abort or restrict further development because:

- (a) the intended approach was proving to be more expensive than thought, and grew (financially) too large to be fully implemented;
- (b) the (policy) priority of the organisation changed because of a specific event (the economic situation of the company deteriorated or an incident in the workplace changed the priority of the organisation);
- (c) it can be difficult to find substitutes if an employee needs to reduce working hours. This creates high workload for other employees, and guidance activities might not be implemented as planned due to time limitations (this problem was encountered in Kiruna).

Putting effort into entrenching and anchoring the project in all levels of the organisation, especially in larger organisations, is an important key element. Most of the instruments have to be embedded in human resources policy, such as individual employee meetings. Entrenchment can be one of the core success factors of an initiative.

Kronoberg County Council is a good example. In this case, considerable effort was put into entrenching and anchoring the project at all levels of the organisation, such as the political administration, human resources department and the central working environment committee. The unions were also involved in the process. Most of the instruments were embedded in human resources management, such as individual employee meetings.

This seems especially relevant in organisations where there is a high turnover of employees and management. To maintain awareness of the age

management strategy and the guidance provided, the organisation must pay continuous attention to introducing new managers to this strategy and (if present) any associated training programme.

If the strategy is not entrenched correctly in the organisation, continuity can be compromised if managers are replaced. This also stresses the relevance of communication, especially within larger, more hierarchical and decentralised organisations; all (management) levels within the organisation need to be aware of the strategy.

Mutual trust is needed for successful implementation and to ensure that guidance works. This is partly embedded in the culture of the organisation. When one of the parties involved (employee or management) does not trust the other party, guidance will not have the desired positive effect. One of the success factors throughout the mentorship programme at the Fresta Sparbank has been company culture. The organisation has a strong focus on competence and personal development of employees, and employees are seen as vital assets to the bank.

When the employee thinks that the guidance interventions are aimed at reducing his workload to 'get rid of him', he will become hesitant to participate. Without a proactive attitude, the employee will not seek guidance support.

The manager must also be willing to provide guidance, and this can be hindered by distrusting the strategy as a whole. If the management (particularly the direct supervisor) does not stand behind the strategy and approach, the activities will not be implemented as initially intended.

To reach this mutual trust, a 'win-win situation' must be created. Both the employee and the organisation (the manager) must see and experience actual benefits. This can be achieved by including different stakeholders when developing guidance activities (for example the occupational councils, unions or external experts).

The 'two-step approach' seems a good context for building mutual trust. The fact that the first step is normally done in a group setting assures a certain level of anonymity within a bigger group. This first step that might help in building the trust, paving the way for a potential individualised, more intensive follow-up with assessment and counselling activities.

Having the right expertise on the matter at hand is important for developing and implementing the right strategy and the selection of activities and methodologies. This expertise can be present in the organisation, via a knowledgeable human resources department, but in some situations involving an (external) expert can help and can be crucial to success.

This is the case in Enemærke og Petersen. The interviewees emphasised that the 'senior conferences' (group meetings) have been successful, because there have been external inputs from experts and consultants in the different fields: legal experts, consultants in pension and consultants from the relevant trade union.

The strategy has to suit the organisation, complementing any human resources strategy. In some organisations, guidance with an age focus and an active concern for all distinct career stages does not fit in the human resources policy of the organisation. This is the situation when an organisation aims its policy at all employees, not attributing a role to age and with no special concern for the specific needs of specific age groups (especially older workers).

Consideration of the lifespan in the development of guidance does not demand targeted measures for specific age groups. A generalist approach can successfully enable quality age management if the needs of individuals are correctly assessed.

7.4. EU policy priorities and the case-studies

This section will look at the how the cases analysed reflect the development of policy priorities, as they are laid down by the European Council resolution on lifelong guidance of 2008 (Council of the European Union, 2008b). Recalling the priorities, they are:

- (a) encouraging the development of CMS;
- (b) widening access to guidance activities;
- (c) ensuring the quality of guidance;
- (d) improving the coordination and cooperation of stakeholders.

The first priority (encouraging CMS) is valued in the workplace, but the focus is mostly cases on skills that are relevant for the organisation, with little focus on general CMS. The main driving factor behind this is that employers often see employability as having the right skills to perform the job at hand and the skills needed to be an active and productive employee.

As noted by Sultana (2011), CMS are often reduced to 'mere' competences, though some cases focus on other subjects that are not job-related. These approaches are mainly focused on the approaching retirement of the older employee and are aimed at facilitating this transition (as in the UK case and cases from France).

The second priority (widening access to guidance activities) is also valued in the workplace. However, there are two important aspects of access to guidance that are worth mentioning:

- (a) we will seldom find approaches targeted at specific age groups, with the exception of mentorships. In most cases, age does not play a big role and general guidance activities for all age groups tend to dominate;
- (b) second, there is the important role of the individual in gaining access to guidance. In some cases the employee has to ask for guidance; if he/she does not see the need, then he/she will not seek the career support offered by guidance activities, such as education programmes or 'self-help' IT training modules and assessments.

The third priority (ensuring quality of guidance) is not high on the agenda of companies and prevalent in guidance provided at this level. Activities normally do not conform to any type of quality framework, though some are based on scientific research and/or known good practices.

An example of this is the research done in Finland (Ilmarinen et al., 1998), especially the work ability index ⁽²⁷⁾: although there is no major case from Finland, this example is mentioned in other cases. Some cases have been inspired by examples that have proven their effect in other companies, quality is usually implied but not made explicit. This kind of non-explicit quality of guidance is most often based on the collective consciousness of the country and available examples.

The use of external professionals can be a potential quality indicator, but is likely incidental, potentially a one-time-deal at the start-up of the age management strategy. Most guidance is not provided by external professionals. It is up to the employer to assess the quality of the service provided by the external professional and to decide if a monitoring system should be implemented. This does not appear to be an important issue for the employers. Developing a quality framework for guidance activities is not generally part of the conscious decision-making process.

The fourth priority; coordination and cooperation of stakeholders, does not seem to get a lot of attention in the cases. Guidance activities are, in most cases, organised internally, through involvement of the human resources department or the direct supervisor. Some cooperation does happen, through external parties such as experts, consultants, trainers and the public employment service. These cases seem to be more the exception than the rule.

⁽²⁷⁾ <http://www.ageingatwork.eu/?i=ageingatwork.en.tools.4> [accessed 27.3.2014].

7.5. Conclusions

Age management strategies have a positive effect on the individual: job satisfaction increases, people stay in their jobs longer and their self-confidence grows. At organisation level, there is an important link between the goals behind the approaches used and guidance activities. Though organisations focus on specific targets, there are unforeseen (positive) effects. Companies see their innovative capability increasing, possibly from better cooperation between generations in the workplace, which leads to the development of new (innovative) insights and products. The total effects at individual and organisation level are seen nationally, which can include a reduction in the costs of unemployment. Cooperation between organisations and schools/universities positively affects the overall match between the skills that are taught at schools and universities and those required on the labour market.

The following key elements are needed for these positive effects:

- (a) time and money must be available for development and implementation;
- (b) the activities must be entrenched and anchored in existing policy;
- (c) mutual trust is important;
- (d) (external) expertise is important for development and implementation;
- (e) the activities must fit in the organisation.

The policy priorities laid down by the European Council (Council of the European Union, 2008b) for national guidance systems are being developed, but not to the full extent stated in the goals themselves. The main focus of the guidance is on job-oriented skills, and less on the development of CMS, though career guidance is still available in limited form for older workers. Guidance is made more accessible in the workplace by age management policies. Quality of guidance is not high on the agenda of the companies, and thus not evident in provision at this level. However, some strategies are based on scientific research and/or known good practices in general. Cooperation between different stakeholders is minimal and the main focus is internal.

CHAPTER 8.

Challenges and key messages

This chapter details the main conclusions of the study and provides recommendations derived from them.

The conclusions are structured according to the main challenges to the development of guidance in active age management in the workplace, at system and at organisation level. Discussion on the challenges addresses the four European policy priorities: development of career management skills, access to guidance, quality provision, and cooperation between stakeholders.

Discussion of the challenges, underpinned by the outcomes of the study, will help identify key messages – proposals or recommendations – to develop further the conditions for effective guidance service delivery for older workers.

These messages apply to the groups and stakeholders playing a role in policy-making and consecutive development and implementation processes. Stakeholders include politicians, ministries, policy-makers, public agencies and public providers, regional and local authorities, social partners, business enterprises, human resources staff, as well as older workers themselves.

Section 8.2 deals with the challenges identified; Section 8.3 provides some key messages for policy-makers.

8.1. Main challenges identified

Challenge 1

Career development services for employed older workers are scarce and weakly supported by guidance tools. Despite the growing policy attention paid to active ageing and the increasing participation figures across countries, older workers still face challenges to remaining employed longer. Career support, publicly provided through guidance and counselling, mainly targets youth entering the labour market or in initial career stages. Public employment services are opening up their offer (such as guidance, counselling, training, and placements) to the employed, and increasingly addressing older workers. Nevertheless, some first evaluation studies show mixed results: these services are rarely used by employed workers and employment services also have a limited amount of time to assist in the specific needs of this target group. The current trend seems to be the implementation of self-service (mainly information) online tools.

Systems should be in place, therefore, to help older workers overcome issues such as skills obsolescence, low self-confidence and stereotyping. These systems should help overcome barriers to work and learning, by improving employers' attitudes to older workers, improving management support to older workers, diminishing age discrimination, improving health/work conditions, and raising qualifications. This could be done by providing accreditation of prior learning, stimulating relevant work experience, improving basic skills, recognising the qualifications of older, experienced migrants, overcoming outdated skills, improving attitude of job seekers by increasing their level of self-confidence, and providing care facilities. Systems should also be in place to help people aspiring to career change find affordable training opportunities.

Challenge 2

Guidance is normally not a specific focus in age management strategies. For example, in Sweden there are no designated funds available for lifelong guidance as an instrument for age management. The same can be said of Germany, where lifelong guidance is mentioned in connection with education and learning rather than with active age management, although there are measures and support instruments that offer various kinds of guidance for older jobless persons, older workers or employers, also in fields other than (vocational) education. The Czech programme for quality of life in old age covers four main areas: education, the social security system, employment policy, and social partnerships, but it still lacks concrete guidance measures. If guidance is embedded it usually concerns career guidance implemented in active labour market policies and vocational and educational training provision, most of the time not specifically addressing older workers.

Challenge 3

Guidance for active age management is still poorly represented in organisation human resources strategies. This requires national or sector policies that provide incentives for employers to provide accessible high quality guidance. Such incentives should stimulate cooperation between different stakeholders and privilege the development of career management skills for older workers.

Challenge 4

Development and implementation of an age management strategy in which guidance activities play an important role, requires investment from firms. Small and medium-sized enterprises have limited financial means for such purposes. Access to additional funds from sector-level organisations, national programmes or European common funds, can play a key role. Information collected at country

level shows that the European Social Fund, especially in the new Member States, is an important driver in financing age management initiatives at the workplace with clear added value, since national public funding is not always available for such initiatives. In some cases, a financial framework is present for funding training activities of individual employees, organised on national or industry level (normally combined with EU funding). These funds can be organised by the national government or by employers and employees who pay a certain percentage of their wage (costs). These funds stimulate participation in training activities.

Challenge 5

Guidance provision is fragmented and there is no consistent institutional framework to support its development in active age management. There are no 'sufficient' policy, legal and financial frameworks in place to stimulate companies to develop active age management in the workplace and address important issues in career guidance for older workers. Active age management strategies are seldom translated into legislation (other than anti-discrimination legislation in the workplace) and are mainly stimulated via financial incentives to employers and employees, the provision of self-help material (internet and handbooks) and awareness raising campaigns.

Guidance frequently serves many different target groups with no integration across programmes aimed at different life stages. It is also often decentralised with uneven accessibility. The main (national) focus seems to be on the unemployed rather than experienced, employed workers. In general, there has been little coordination between education and employment sectors and between private and public sectors, but this has begun to change. Lifelong learning, career guidance, employment, and active age management policies should be better linked, reflecting the different stages in an individual's career, acknowledging it as a continuum.

Challenge 6

There are few guidelines for quality delivery of active age management, and especially for guidance provision in the workplace (such as standards for staff involved in guidance activities, quality procedures). There are no agreed standards for required practitioner skills or methodologies and tools. Conditional requirements are sometimes set by funding programmes; these can set requirements for a quality system or evaluation of the project. The situation is even less homogeneous at company level, where even in the countries with strong guidance systems, it is up to the company to decide whom they see as a good guidance practitioner or provider. If a company has a quality system it does

not necessarily share the same principles as the public quality assurance framework for guidance or other associated systems. Systems for validating non-formal learning are clear practical examples of broad guidance-based activities with enormous inter-company variation.

Challenge 7

There is currently no established method to follow up and evaluate the benefits of guidance and no systematic monitoring and assessment of guidance activities in most countries. This is partly related to the absence of quality guidelines, which would normally carry the implication of a structured monitoring system. Whenever evidence is collected it is not harmonised in accordance with a standard that may allow for the comparative study of the effectiveness of initiatives. Absence of evidence about the effects of guidance and active age management strategies, creates uncertainty among governments and employers about the benefits of career guidance. Further, absence of a knowledge base hinders opportunities for transferring practices across different organisations, sectors or countries.

Challenge 8

The potential of ICT tools is not fully explored. Online instruments provide increasing opportunities for information and guidance to specific groups. This can be done by using ICT tools to inform at national level, through the public employment services, or through assessment tools at organisation level. However, more attention can be paid to using these tools better, as more (and better) use could stimulate an employee to learn. One area which seems to be worth developing is exchange of learning experiences among peers. Attention is also needed in making the tools available (and comprehensible) for all groups, since not everyone has the same skill level in using ICT tools.

Challenge 9

Older workers are valuable assets that can be easily lost by enterprises, due to insufficient use of guidance methodologies. Keeping older workers active and productive is considered the most important aim in implementing an age management strategy, approach and guidance. Further, organisations are facing challenges in retaining the knowledge of older workers, whose experience, direct productive potential and management potential is frequently undervalued. Hiring new, inexperienced staff is often preferred over assessment of skills needs, attitudes, preferences and the job redeployment possibilities of older workers. Guidance provision is often limited to providing signposting, informing, advising and mentoring.

Challenge 10

Guidance is seldom provided as an individualised, non-directive, adaptable service. In the cases studied guidance is made available for older workers, but not as a dedicated activity; it is more frequently a discrete element in standard human resources policies, such as yearly appraisal talks with the manager, and not provided in a neutral, ethical and non-directive way. Guidance is not always explicitly available, tends to be weakly signposted and follows a generalist approach, not making an identification of the needs of workers across the lifespan. In many cases the employee has to request guidance, since it will not be offered by the organisation.

Challenge 11

Guidance usually does not follow on a life-span approach. Both previous challenges reflect insufficient consideration of the changing needs and roles of an individual across the duration of his/her active life. In most cases analysed for this study, guidance is linked to a specific moment in time. Although employees may benefit from guidance activities on turning points in their career (as when they are approaching retirement), these activities are provided on an *ad hoc* basis. In general, there is a lack of structural approach to the development of employees' careers, which accounts for the change in their skills, attitudes and expectations.

Challenge 12

Guidance is not always embedded in the work processes and management of firms. Beyond the occasional character of guidance provision, commitment is needed to embed guidance in the work process of the organisation. Direct supervisors tend to play a key role in the provision of guidance to employees. Access can be limited, if the direct supervisor is not aware of his own role in the provision of guidance and/or is not aware of the other possibilities offered through the age management strategy. This is why guidance must be structurally embedded (and signposted) throughout all layers of the organisation, especially for the direct supervisor.

Challenges 13

The development of career management skills is often overlooked. Approaches most used in age management strategies are career development through training and lifelong learning, mostly aimed at job-related skills; the career development of the individual is strictly understood within the walls of the organisation. Some career management skills are overlooked with this type of approach: increasing access to labour market information, external learning opportunities; development of self-awareness regarding skills, attitudes and

expectations; application writing training and CV building; and job-search techniques. In some cases organisations may not even have a perception of how using the basic, social and personal skills of their employees may increase their productivity, and fail to invest in their development ⁽²⁸⁾.

Challenge 14

Explicit quality assurance systems are rare and outcomes rarely monitored or evaluated. Assuring guidance quality is not high on the agenda of most companies and generally lacks any form of quality framework. There are exceptions, where activities are based on scientific research and/or known good practices. Quality criteria are mainly implicit in these cases and often based on local world visions and on available examples. Further, it is up to the employer to decide whether guidance professionals should satisfy some quality criteria regarding their qualifications and skills. The rationale of employers is outcome-oriented and generally the implementation of a quality framework for guidance activities is not part of the conscious decision-making process to achieve the expected outcomes. External provision (by trained experts) could contribute to quality and ensure that activities are developed in a safe, neutral environment, outside the company where the employee can speak openly about his/her problems, needs and ambitions. The use of external professionals is most likely incidental, a one-time-deal at the start-up of the age management strategy. Whenever the outcomes of guidance activities are monitored and evaluated it is usually due to external financing by the European Social Fund or other programmes that set obligations in this respect. Cases provided little hard evidence about the effect of their policies, which hampers comparability and diffusion of good practices, by not generating convincing proof about their added value.

8.2. From challenge to key messages

The key challenges identified in the study can be used as a reference to formulate key messages for the following stakeholders:

- (a) policy-makers at different levels (national, regional or in a sector);
- (b) professional guidance providers;
- (c) employers.

⁽²⁸⁾ This became evident in the first PIAAC (OECD, 2013) results on the use of soft skills by firms.

Key message 1: establish frameworks for lifelong career development

Despite the principles laid down by the 2008 Council resolution, (Council of the European Union, 2008b) guidance provision across the lifespan is still fragmented, both in terms of policies and stakeholder engagement. The establishment of an overarching framework could stimulate the development of a coherent system assuring access, quality, and cooperation, and encourage career development. The basis for such a framework should be a homogeneous definition of age management, guidance and the role of the different actors. All policy priorities are interconnected, nevertheless, in enterprise contexts; prioritising individual access to guidance in the workplace is fundamental. Motivating older workers to have an active attitude to career development: guaranteeing their fair and ethical treatment is also fundamental. Stimulating packages should be set up for starting up guidance activities at company level: financial incentives; good practices, guidelines; and awareness-raising activities, communicating the effects of guidance in the workplace.

Key message 2: better coordination of guidance activities must be achieved in the cooperation with social partners

Guidance should be better integrated in active age management strategies at both national and sector level. This policy issue is closely related to the adoption of a lifelong understanding of career development as a basis for the definition of guidance systems. The current fragmentary organisation of most guidance systems, based on institutional sector definition tends, to ignore continuous career development for individuals. Guidance provision across an individual learning and work context can be improved if individual experiences, skills and needs are considered and assessed. This requires coordination between stakeholders, which can be formalised in common registry tools such as portfolios, the development of common career management skills frameworks, sharing client databases (within ethical principles) and practical day-to-day cooperation in the handling of individual cases. Public employment services and education providers should streamline their guidance provision for employed older workers, developing outreach strategies, to inform employers and employees about their services and to provide guidance in a flexible manner (at the time, location, and in the form that comply with the needs of the worker). All of organisations involved (employers, unions, guidance providers, employment services, etc.) must work towards development of career management skills, access to guidance and quality of guidance.

Key message 3: build a public case for career guidance in work contexts and for employed, older workers

The case for career guidance for the employed older worker needs to be communicated more effectively. Arguments built in a public discussion need to raise awareness of the importance of lifelong career development to the operation and sustainability of a knowledge economy. Stronger arguments must be created around the potential productive contribution of older experienced people to the economy and society. National guidance forums are particularly useful contexts to engage different stakeholders in this discussion.

Some approaches and guidance instruments are less used, likely due to lack of awareness of the full spectrum of guidance activities and methodologies. Employment services could cooperate to redress this, cooperating with stakeholders such as trade unions and employers' organisations to help raise awareness of the value of guidance. The development of an evidence base on the effectiveness of guidance instruments is also important in achieving greater employer interest.

Key message 4: stimulate a life-span approach

Age management and guidance embedded in the work process of the organisation and aimed at all life stages of an employee must be stimulated. For age management and guidance to have a long-term effect they need to be by structural instead of an *ad hoc*. The options are varied at this level, allowing a more prescriptive approach based on previous identification of age-related needs and standardised guidance interventions, or a more tailored support to career planning. The most rational options for enterprises are likely to lie with a mixed pattern adjusted to organisation needs and possibilities. Self-service ICT tools can also be used to promote exchange of experiences, self-assessment and career support adapted to each person's development, combined with external help.

Key message 5: more attention is needed to guidance aimed at developing career management skills

Enterprises have a strong focus on skills relevant to the job at hand. Both employers and external guidance providers should address more general career management skills in their curricula. These not only have a direct effect over firms' productivity, they also organise employees' ideas about their own career development, thus promoting up-skilling, job satisfaction and motivation. The development of career management skills tends to reduce the incidence of burnout and skills obsolescence. Collective labour agreements could include an explicit reference to the importance of career management skills. This must also

be supported by a life-span approach for all employees, with an integrated vision of their career stages.

Key message 6: assure the quality of guidance by professionalising staff, standardising methodologies and monitoring outcomes

Provide training modules to update skills and competences and provide financial incentives to do so. An important dimension here is also the skills of the guidance provider: he/she must have the right skill set for providing good guidance. National legislation and guidelines regarding the provision of guidance can help to stimulate this development; such guidelines should also refer to standard characteristics of the methodologies implemented. Guidelines are especially important for guidance providers in the workplace, which are usually the direct supervisors of an employee.

Practice outcomes should be monitored according to established standards. It is important to underpin guidance policies for older workers with evidence, showing the effects of policies for organisations and individuals. This will help reinforce the business case for adopting guidance policies for older workers, stimulating the adoption and diffusion of good practices.

Key message 7: empower older workers and particularly support at risk groups

Older workers can be empowered by providing demand side funding instruments for guidance, such as vouchers, so they can decide themselves what offer to take. There are specific groups that might need additional attention, because they might be at greater 'risk' of not having access to workplace guidance. This is the case of people working in SMEs, those employed in geographically remote regions, and certain industry sectors, who might require additional attention with regard to support initiatives.

List of abbreviations

| | |
|-----|---|
| CMS | career management skills |
| ESF | European Social Fund |
| ICT | information and communications technology |
| RPL | recognition of prior learning |
| SME | small and medium-sized enterprise |

References

[URLs accessed 26.3.2014]

- Adecco Group (2011). *It's time to manage change: overview of labour market practices affecting older workers in Europe*. Paris: Groupe Adecco France. Adecco Group white paper. http://www.adecco.com/en-US/Industry-Insights/Documents/mature_workers_2011.pdf
- ASPA (2010). *Report on organisational case studies. National report: Italy*. ASPA (Activating senior potential in ageing Europe). http://www.aspa-eu.com/Publications/Deliverables/291012/ASPA%20D-4-2%20National%20Report%20Italy_12_a.pdf
- Avramov, D.; Maskova, M. (2003). *Active ageing in Europe: Volume 1*. Strasbourg: Council of Europe Publishing. Population studies.
- Barham, L. (2011). Career development in later working life: implications for career guidance with older workers. In: Cedefop (ed.). *Working and ageing: guidance and counselling for mature learners*. Luxembourg: Publications Office, pp. 186-202. http://www.cedefop.europa.eu/EN/Files/3062_en.pdf.
- Bender, S. et al. (2009). WeLL – Unique linked employer-employee data on further training in Germany. *Schmollers Jahrbuch*, Vol. 129, No 4, pp. 637-643.
- Broek, S.D. et al. (2010). *Impact of ongoing reforms in education and training on the adult learning sector*. Zoetermeer: Research voor Beleid. http://www.academia.edu/630325/Impact_of_Ongoing_Reforms_in_Education_and_Training_on_the_Adult_Learning_Sector
- Brown, A. et al. (2010). *Changing patterns of work, learning and career development across Europe*. Brussels: Education, Audiovisual and Culture Executive Agency.
- Cedefop (2005) *Improving lifelong guidance policies and systems: using common European reference tools*. Luxembourg: Publications Office. http://www.cedefop.europa.eu/EN/Files/4045_en.pdf
- Cedefop (2008a). *Career development at work: a review of career guidance to support people in employment*. Luxembourg: Publications Office. Cedefop panorama series; No 151. http://www.cedefop.europa.eu/EN/Files/5183_en.pdf
- Cedefop (2008b). *Establishing and developing national lifelong guidance policy forums: a manual for policy-makers and stakeholders*. Luxembourg: Publications Office. Cedefop panorama series; No 153. http://www.cedefop.europa.eu/EN/Files/5188_en.pdf
- Cedefop (2008c) *Terminology of European education and training policy: a selection of 100 key terms*. Luxembourg: Publications Office. http://www.cedefop.europa.eu/EN/Files/4064_en.pdf

- Cedefop (2010). *Working and ageing: emerging theories and empirical perspectives*. Luxembourg: Publications Office.
http://www.cedefop.europa.eu/EN/Files/3053_en.pdf
- Cedefop (2011a). *Learning while working: success stories on workplace learning in Europe*. Luxembourg: Publications Office.
http://www.cedefop.europa.eu/EN/Files/3060_en.pdf
- Cedefop (2011b). *Lifelong guidance across Europe: reviewing policy progress and future prospects*. Luxembourg: Publications Office. Cedefop working paper; No 11. http://www.cedefop.europa.eu/EN/Files/6111_en.pdf
- Cedefop (2011c). *Working and ageing: guidance and counselling for mature learners*. Luxembourg: Publications Office.
http://www.cedefop.europa.eu/EN/Files/3062_en.pdf
- Cedefop (2015). *Case studies*. Background material to the report *Increasing the value of age: guidance in employers' age management strategies*.
<http://www.cedefop.europa.eu/en/publications-and-resources/publications/5544>
- Cedefop (forthcoming). *Assessing competences in enterprises: main findings from the Cedefop study on validation of non-formal and informal learning in European enterprises*.
- Clark, M.; Arnold, J. (2008). The nature, prevalence and correlates of generativity among men in middle career. *Journal of vocational behaviour*, December 2008, Vol. 73, No 3, pp. 473-484.
<http://dx.doi.org/10.1016/j.jvb.2008.09.002>
- Council of the European Union (2003). Council decision of 22 July 2003 on guidelines for the employment policies of the Member States. *Official Journal of the European Union*, L197, 5.8.2003, pp. 13-14. <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2003:197:0013:0021:EN:PDF>
- Council of the European Union (2005). Council decision of 12 July 2005 on guidelines for the employment policies of the Member States. *Official Journal of the European Union*, L 205, 6.8.2005, pp. 21-22. <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2005:205:0021:0027:EN:PDF>
- Council of the European Union (2008a). Council decision on guidelines for the employment policies of the Member States. *Official Journal of the European Union*, L 198, 26.7.2008, pp. 47-54. <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2008:198:0047:0054:EN:PDF>

- Council of the European Union (2008b). Resolution of the Council and of the Representatives of the governments of the Member States, meeting within the Council of 21 November 2008 on better integrating lifelong guidance into lifelong learning strategies. *Official Journal of the European Union*, C 319, 13.12.2008, pp. 4-7. <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2008:319:0004:0007:EN:PDF>
- Council of the European Union (2009). Council conclusions of 12 May 2009 on a strategic framework for European cooperation in education and training (ET 2020). *Official Journal of the European Union*, C 119, 28.5.2009, pp. 2-10. <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2009:119:0002:0010:EN:PDF>
- Council of the European Union (2010). Council conclusions on active ageing: *3019th employment, social policy health and consumer affairs Council meeting*, Luxembourg, 7 June 2010. http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/lsa/114968.pdf
- Council of the European Union (2012). Council recommendation of 20 December 2012 on the validation of non-formal and informal learning. *Official Journal of the European Union*, C 398, 22.12.2012, pp. 1-5. <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2012:398:0001:0005:EN:PDF>
- Council of the European Union; European Commission (2010). *The Bruges communiqué*. <http://libserver.cedefop.europa.eu/vetelib/2010/75928.pdf>.
- Cross, K.P. (1981). *Adults as learners: increasing participation and facilitating learning*. San Francisco: Jossey-Bass.
- DARES (2011). *Les accords collectifs d'entreprise et plans d'action en faveur de l'emploi des salariés âgés: une analyse de 116 textes [Enterprise collective agreements and action plans for older workers' employment: an analysis of 116 texts]*. Document d'étude; No DE2011/157. Paris: Ministry of Labour, Employment and Social Dialogue. http://travail-emploi.gouv.fr/IMG/pdf/DE157_accordssalariesages_final.pdf
- Davey, J.A. (2002) Active ageing and education in mid and later life. *Ageing and society*, Vol. 22, pp. 95-113.
- Edwards, P. (2010). *Skills and the small firm: a research and policy briefing*. London: UK Commission for Employment and Skills. <http://www.ukces.org.uk/assets/ukces/docs/publications/briefing-paper-skills-and-the-small-firm.pdf>
- EIM business and policy research (2011). *Do SMEs create more and better jobs?* Brussels: EIM. http://ec.europa.eu/enterprise/policies/sme/facts-figures-analysis/performance-review/files/supporting-documents/2012/do-smes-create-more-and-better-jobs_en.pdf

- Eurofound (2006). *A guide to good practice in age management*. Luxembourg: Publications Office.
<http://www.eurofound.europa.eu/pubdocs/2005/137/en/1/ef05137en.pdf>
- Eurofound (2008). *Working conditions of an ageing workforce*. Luxembourg: Publications Office.
<http://www.eurofound.europa.eu/publications/htmlfiles/ef0817.htm>
- Eurofound (2012a). *Impact of the recession on age management policies: case study: KPN, the Netherlands*. Dublin: Eurofound.
<http://www.eurofound.europa.eu/publications/htmlfiles/ef117520.htm>
- Eurofound (2012b). *Employment trends and policies for older workers in the recession*. Luxembourg: Publications Office.
<http://www.eurofound.europa.eu/publications/htmlfiles/ef1235.htm>
- European Commission (1999). *Towards a Europe for all ages: promoting prosperity and intergenerational solidarity: communication from the Commission*. COM(1999) 221 final.
http://ec.europa.eu/employment_social/social_situation/docs/com221_en.pdf
- European Commission (2005a) *Green paper: confronting demographic change: a new solidarity between the generations: communication from the Commission*. COM(2005) 94 final. <http://old.eu-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2005:0094:FIN:EN:PDF>
- European Commission (2005b). *Working together for growth and jobs: a new start for the Lisbon strategy: communication to the Spring European Council*. COM(2005) 24 final. http://europa.eu/documentation/official-docs/index_en.htm
- European Commission (2006). *The demographic future of Europe: from challenge to opportunity: Commission communication*. COM(2006) 571 final.
<http://old.eu-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2006:0571:FIN:EN:PDF>
- European Commission (2009). *EU employment summit agrees on way to tackle rising unemployment*. Press release, 7 May 2009, IP/09/718.
http://europa.eu/rapid/press-release_IP-09-718_en.htm
- European Commission (2010a). *Europe 2020: a strategy for smart, sustainable and inclusive growth: communication from the Commission*. COM(2010) 2020 final. <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2010:2020:FIN:EN:PDF>
- European Commission (2010b). *Green paper: towards adequate, sustainable and safe European pension systems*. COM(2010) 365 final. <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2010:0365:FIN:EN:PDF>
- European Commission (2011). *Innovation Union scoreboard 2010: the Innovation Union's performance scoreboard for research and innovation*.
http://ec.europa.eu/research/innovation-union/pdf/iu-scoreboard-2010_en.pdf

- European Commission (2012a). *Active ageing*. Special Eurobarometer; No 378. http://ec.europa.eu/public_opinion/archives/ebs/ebs_378_en.pdf
- European Commission (2012b). *Europeans ready for active ageing, new survey says*. Press release, 13 January 2012, IP/12/16. http://europa.eu/rapid/press-release_IP-12-16_en.htm?locale=en
- European Commission (2012c). *White paper: an agenda for adequate, safe and sustainable pensions*. COM(2012) 55 final. <http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52012DC0055&rid=1>
- European Commission; Committee of the Regions of the EU (2011). *How to promote active ageing in Europe: EU support to local and regional actors*. Luxembourg: Publications Office. <http://dx.doi.org/10.2767/36193>
- European Council (2000). *Nice European Council, 7, 8 and 9 December 2000*. Presidency conclusions; No 400/1/00. http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/ec/00400-r1.%20ann.en0.htm
- European Council (2001a). *European Council meeting in Laeken, 14 and 15 December 2001*. Presidency conclusions; No 00300/1/01. http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/ec/68827.pdf
- European Council (2001b). *Göteborg European Council, 15 and 16 June 2001*. Presidency conclusions; No 100/1/01. http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/ec/00200-r1.en1.pdf
- European Council (2001c). *Stockholm European Council, 23 and 24 March 2001*. Presidency conclusions; No 100/1/01. http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/ec/00100-r1.%20ann-r1.en1.html
- European Council (2002). *Barcelona European Council meeting, 15 and 16 March 2002*. Presidency conclusions; No 100/1/02. http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/ec/71025.pdf
- European Council (2003). *Brussels European Council meeting, 20 and 21 March 2003*. Presidency conclusions; No 8410/03. http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/ec/75136.pdf
- European Council (2005). *Brussels European Council meeting, 22 and 23 March 2005*. Presidency conclusions; No 7619/1/05 Rev1. http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/ec/84335.pdf
- Ford, G. (2007). Introduction to the third age guidance pilots. In: Clayton, P.M. et al. (eds). *Guidance for life: working and learning in the third age*. Roma: Franco Angeli, pp. 125-148.

- Holland, J.L. (1973). *Making vocational choices: a theory of careers*. Englewood Cliffs, NJ: Prentice-Hall.
- Holland, J.L. (1985). *Making vocational choices: a theory of vocational personalities and environments*. Englewood Cliffs, NJ: Prentice-Hall.
- Hu, L. (2003). The hiring decision and compensation structures of large firms. *Industrial and labour relations review*, Vol. 56, No 4, pp. 663-681.
<http://digitalcommons.ilr.cornell.edu/cgi/viewcontent.cgi?article=1023&context=ilrreview>
- Ilmarinen, J. et al. (1998). *Work ability index*. Helsinki: Finnish Institute of Occupational Health.
- Laslett, P. (1991). *A fresh map of life: the emergence of the third age*. Publisher: Harvard University Press.
- Lissenburgh, S.; Smeaton, D. (2003). *Employment transitions of older workers: the role of flexible employment in maintaining labour market participation and promoting job quality*. Bristol: Policy Press.
<http://www.jrf.org.uk/system/files/jr137-employment-flexible-participation.pdf>
- Maltby, T. (2011). Extending working lives? Employability, work ability and better quality working lives. *Social policy and society*, July 2011, Vol. 10, No 3, pp. 299-308. <http://dx.doi.org/10.1017/S1474746411000030>
- Manpower (2006). *Older worker recruiting and retention survey: global results*. Milwaukee: ManpowerGroup.
https://candidate.manpower.com/wps/wcm/connect/6085ef804ec2f1f6ac16fde16aecd97/Manpower+survey+_OlderWorker_Results.pdf?MOD=AJPERES
- Naegele, G.; Walker, A. (2000). *Ageing in employment: a European code of good practice*. Brussels: Eurolink Age.
- OECD (2006). *Live longer, work longer: a synthesis report*. Paris: OECD. Ageing and employment policies. <http://dx.doi.org/10.1787/9789264035881-en>
- OECD (2011). *Education at a glance*. Paris: OECD.
<http://dx.doi.org/10.1787/eag-2011-en>
- OECD (2013). *OECD Skills outlook 2013. First results from the survey of adult skills*. Paris: OECD. <http://skills.oecd.org/skillsoutlook.html>
- Parsons, F. (1909). *Choosing a vocation*. Boston: Houghton-Mifflin.
<https://archive.org/details/choosingavocati01parsgoog>
- Plant, P. (2008). On the shop floor: guidance in the workplace. In: Athanasou, J.A.; van Esbroeck, R. (eds). *International handbook of career guidance*. New York: Springer, pp. 265-281.

- Schalk, R.; van Woerkom, M. (2010). Does age influence the relationship between learning opportunities at work and employee wellbeing and mobility? Paper presented at the *European conference on educational research, Vienna, 25 to 30 September 2009*.
<http://vetnet.mixxt.org/networks/files/download.7613>
- Schröder, H. et al. (2004). *Nicht-Teilnahme an beruflicher Weiterbildung: Motive, Beweggründe, Hindernisse [Non-participation of vocational training: motives, reasons, barriers]*. Bielefeld: Bertelsmann.
- Smeaton, D. et al. (2009). *Older workers: employment preferences, barriers and solutions*. London: Equality and Human Rights Commission. Research report; No 43.
http://www.equalityhumanrights.com/uploaded_files/research/older_workers_employment_preferences_barriers_and_solutions_v2.pdf
- Stephen, A. (2006). The recognition of prior learning in the context of European trends in higher education and lifelong learning. In: EULLearN (2006). *Recognising experiential learning: practices in European Universities*. Tartu: University Press, pp. 37-53. http://www.connect-project.eu/digitalcity/servlet/PublishedFileServlet/AAABBABX/Recognising_Experiential_Learning.pdf
- Super, D.E. (1980). A life-span, life-space approach to career development. *Journal of vocational behavior*, Vol. 16, No 3, pp. 282-298. [http://dx.doi.org/10.1016/0001-8791\(80\)90056-1](http://dx.doi.org/10.1016/0001-8791(80)90056-1)
- Sultana, R.G. (2011). *Assessing career management skills: reflection note following the WP1 field visit to Toulouse, France*. Jyväskylä: Finnish Institute for Educational Research.
https://ktl.jyu.fi/img/portal/21717/Reflection_Note_following_the_WP1_field_visit_to_Toulouse-final_versi.pdf?cs=1324385712
- Super, D.E. (1990). A life-span, life-space approach to career development. In: Brown, D.; Brooks, L. (eds). *Career choice and development: applying contemporary approaches to practice*. San Francisco, CA: Jossey-Bass.
- Swedish Government (2013). *Åtgärder för ett längre arbetsliv: slutbetänkande av Pensionsåldersutredningen [Actions for a longer working life: final report on pension age research]*. Stockholm: Elanders Sverige AB. Government official reports; SOU 2013:25.
<http://www.government.se/content/1/c6/21/41/48/22f09020.pdf>
- von Nordheim, F. (2003). EU policies in support of Member State efforts to retain, reinforce and reintegrate older workers in employment. In: Buck, H.; Dworschak, B. (eds). *Ageing and work in Europe: strategies at company level and public policies in selected European countries*. Stuttgart: Fraunhofer IAO, pp. 9-26. Demography and employment.
http://www.demotrans.de/documents/BR_DE_BR15.pdf

- Walker, A. (2001). Towards active ageing in the European Union. Paper prepared for the *Millennium project workshop: towards active ageing in the 21st century*, Japan Institute of Labour, Tokyo, 29 and 30 November, 2001. <http://www.jil.go.jp/jil/seika/eu2.pdf>
- Walker, A.; Eurofound (1997). *Combating age barriers in employment: European research report*. Brussels: European Commission.
- Williamson, E.G. (1939). *How to counsel students: a manual of techniques for clinical counsellors*. New York: McGraw-Hill.

Legislation

- Loi No 2008-126 du 13 février 2008 relative à la réforme de l'organisation du service public de l'emploi [Law No 2008-126 of 13 February 2008 on the reform of the public employment service]. *Journal Officiel de la République Française*, 14 February 2008, Text 2, NOR: ECEX0770283L. <http://www.legifrance.gouv.fr/affichTexte.do?cidTexte=JORFTEXT000018117826>
- Loi No 2008-1330 du 17 décembre 2008 de financement de la sécurité sociale pour 2009 [Law No 2008-1330 of 17 December 2008 for the financing of social security for 2009]. *Journal Officiel de la République Française*, 18 December 2008, Text 1, NOR: BCFX0823210L. <http://www.legifrance.gouv.fr/affichTexte.do?cidTexte=JORFTEXT000019942966>
- Loi No 2009-1437 du 24 novembre 2009 relative à l'orientation et à la formation professionnelle tout au long de la vie [Law No 2009-1437 of 24 November 2009 on orientation and lifelong learning]. *Journal Officiel de la République Française*, 25 Novembre 2009, Text 2, NOR: ECEX0908316L. <http://www.legifrance.gouv.fr/affichTexte.do?cidTexte=JORFTEXT000021312490&categorieLien=id>

Websites

- Eurofound: European company survey (ECS) 2009 <http://www.eurofound.europa.eu/surveys/ecs/2009/index.htm>
- European year for active ageing and solidarity between generations <http://europa.eu/ey2012/>
- European social fun: data and figures <http://ec.europa.eu/esf/main.jsp?catId=440&langId=en>
- Work ability index <http://www.ageingatwork.eu/?i=ageingatwork.en.tools.4>

Increasing the value of age

Guidance in employers' age management strategies

The European active population is ageing. In the face of growing skills shortages, both national States and employers need to prolong the working lives of their most experienced workers. While enterprises strive to respond to this challenge, most still have not fully explored the potential of guidance activities in addressing age-related issues in career development. This Cedefop study analyses the role of guidance in the age management strategies of firms.

Evidence from this report illustrates how guidance activities allow older individuals to plan their mature career stages and exit strategies in a structured way, increasing the likelihood of successfully prolonging their careers. Guidance also allows firms to maximise the potential of their human resources, by providing tools to assess and develop worker skills and knowledge, as well as strategies to increase the productive contribution of the older workforce. If supported by a life-span perspective, guidance allows for effective age management strategies, with smooth integration in internal processes and covering all staff.

The findings of this report encourage further development of the role of guidance in age management strategies, offering insights on the creation of incentives for firms and individuals, on strategies for stakeholder engagement, and on the application of quality frameworks.

