

# Age Management Implementation

Case Study Analysis  
and Methodology Recommendation



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# Defining age management

In Europe, retirement ages are postponed in an effort to adapt to the new demographic distribution, because the ageing Europe is a reality that cannot be ignored. Therefore, the proportion of older workers is increasing and companies must prepare for a further increase in the ages of their employees.



Age Management as a concept is relatively obscure in management theories. It directly relates to population ageing, active ageing, managing a diverse team and preventing discrimination.

In a wider sense, age management can be defined as “the management of organizations’ productivity and human resources in a way that acknowledges employees’ resources during their individual life course” (Wallin, 2015)<sup>[1]</sup>. Walker (1997) refers to it as the various dimensions by which human resources are managed within organizations with an explicit focus on ageing and, also, more generally, to the overall management of workforce ageing via public policy or collective bargaining. An overview of the different dimensions of age management is provided in *Table 1*. The dimensions are not mutually exclusive and at best are combined to accommodate needs and specificities of older employees.

<sup>1</sup> Wallin, M. (2015). Age Management at workplaces. In: African Newsletter on Occupational Health and Safety - Age management including young workers. Finnish Institute of Occupational Health. Volume 25 (2), September 2015.

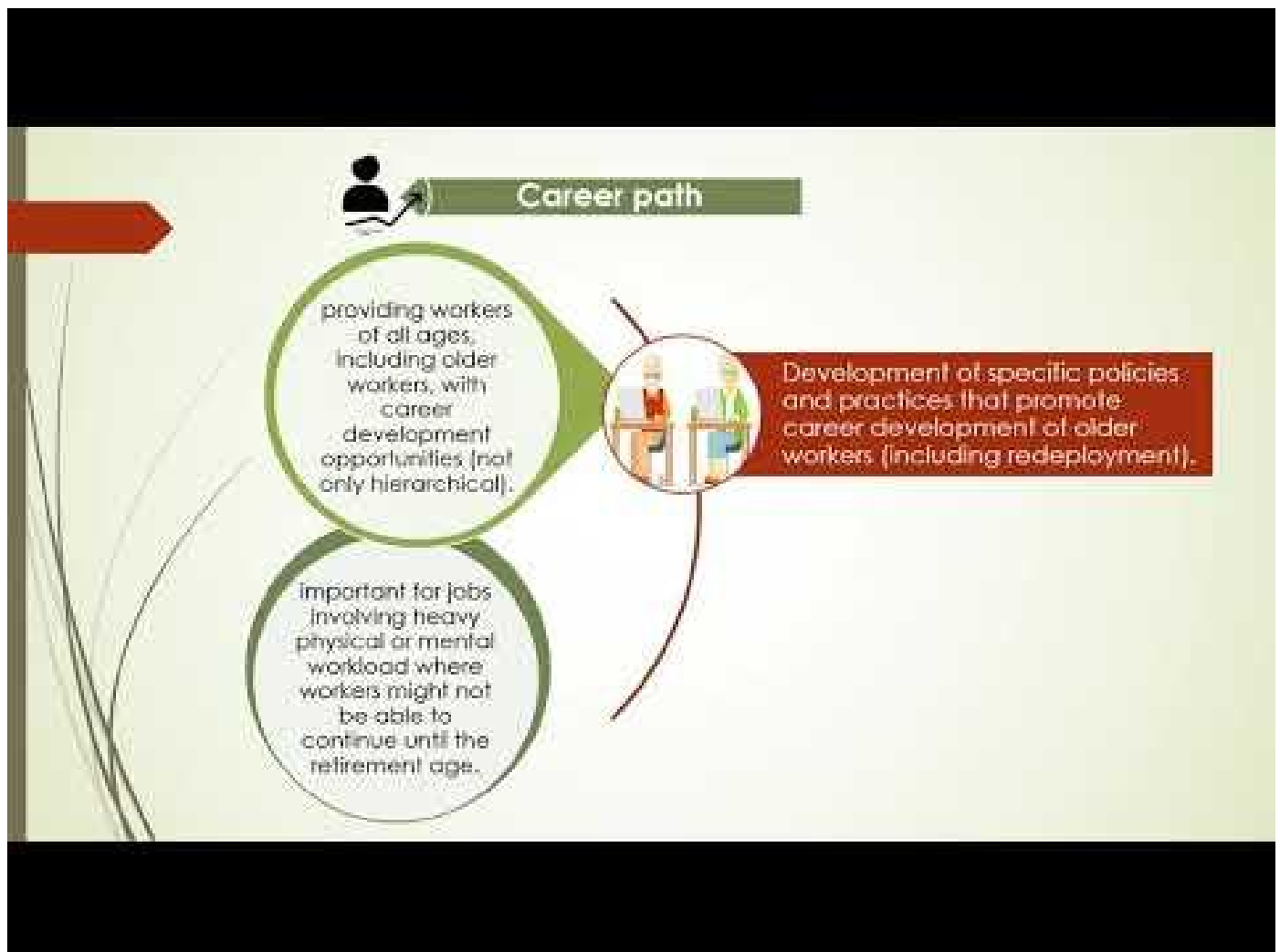
Table 1 Dimensions of age management practices (Source: Naegele and Walker, 2006)[2]

Dimension	Description/approaches
Job recruitment	It includes waiving age limits in job advertisements; a selection process focused on skills, competencies and experiences as well as on the individual needs of older applicants; cooperation with local recruitment agencies; wage subsidies or settling-in grants; age-specific advertisement campaigns; explicitly targeting older applicants who are unemployed, threatened by dismissal, or already in involuntary early retirement.
Training and life-long learning	Approaches include the absence of age limits in determining access to in-house learning and training opportunities; linking training schemes to an individual's life course; using older employees and their qualifications both as facilitators of further education for older and younger employees, and as an organizational 'knowledge pool'.
Career development	Older employees are provided with opportunities to progress, maintain and enlarge their skills and knowledge through structuring demands, incentives and stresses in the working life in such a way that their motivation and performance are promoted and applied in the most effective manner.
Flexible working time practices	These practices encompass affording older workers greater flexibility in their hours of work or in the timing and nature of their retirement. Examples include gradual retirement, flexibility over retirement age and the provision of training to older workers in community programs, and short-term work placements.
Health protection and promotion and workplace design	Studies on health risks in the workplace; organizational health reports and working groups on health; the use of health experts to advise the organization; employee surveys; employee participation and education; regular health checks; training supervisors and key workers in health management techniques; ergonomic workplace (re)design; preventive redeployment; health-promoting working time arrangements.
Redeployment	Redeployment refers to coordinating the demands of the workplace with the capacity of the (older) employees. Good practice can be assured if redeployment is viewed as part of a preventive age management strategy geared to maintaining employability – particularly in terms of flexibility, qualification and skill enhancement and health protection.
Employment exit and transition to retirement	These approaches include preparatory measures for retirement at the corporate level; counseling facilities; providing assistance in the search for a new position; providing opportunities for retirees to maintain contact with colleagues; flexible forms of transition; flexible forms of retirement that allow for a phased reduction of working hours; sabbatical time to prepare for retirement.

2 Naegele, G. & Walker, A. (2006). A Guide to Good Practice in Age Management. Dublin

Comprehensive approaches to age management take the above-mentioned dimensions as well as the gender dimension into account. They merge aspects from recruitment to employment in one HR strategy, emphasize prevention of age related problems, focus on the entire working life and all age groups and in the short term, provide remedial provisions for older workers who are already affected by age-specific occupational problems such as skill deficits as a result of deskilling or poor health resulting from heavy workloads (Naegele and Walker, 2006).

Implementation of these dimensions can be reflected by policies initiated by both the government and corporate level and varies greatly by country even in Europe, perceived as a leader in this field.<sup>[3]</sup>



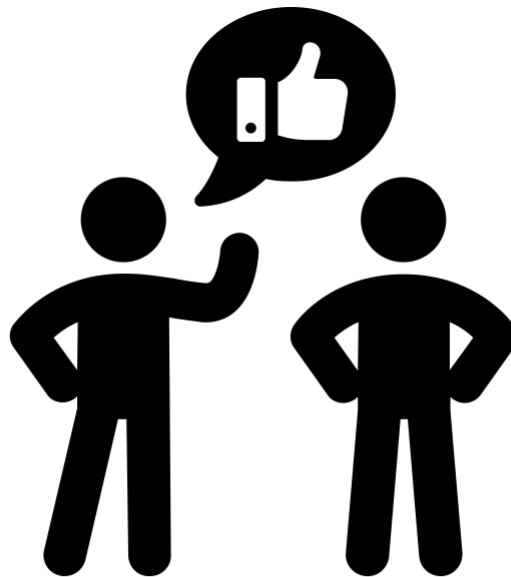
<sup>3</sup> Walker, A. (2005). The emergence of age management in Europe. *International Journal of Organisational Behaviour*, Volume 10 (1), 685-697 ISSN 1440-5377

## Project: Age Management Masterclass

The project aimed to collect a set of age management examples from several European countries and process them into stories providing inspiration and guidance for age management implementation.

As each success story brings a genuine set of conditions under which the company has to take decisions, the example itself represent a unique learning material for the potential end users, which can be either the age management advisors in the company management system or trainers (in-company trainers working with the employees, or the VET teachers/trainers working with the students and learners in the educational courses).

The ultimate objective of the project was providing the insight into the decision making and problem solving processes of the real companies dealing with age-related issues. In order to deliver the intended project output, all collected information has been subjected to a thorough analysis and the conclusions have been summarized into a set of recommendations



Created by Adrien Coquet  
from Noun Project



# Analysis of age management case studies

## Case study selection and data gathering

The objective of this study was to analyse the scientific evidence available to support age management practices toward older workers.

A qualitative research design was chosen to identify and explore perceptions of organizational measures and strategies. Data was collected from a variety of organizations, representing different branches, sizes and forms (from public organizations, large private companies, small and medium-sized enterprises, NGOs, etc.). The study cases were built on interviews with key people such as managers, older workers, administrators, occupational medicine personnel and HR personnel.

The organisations were recruited using established contacts according to each particular context (personal relationships, internet research, local labour market studies, local professional networks, etc.). Semi-structured interviews were carried out during 2019-2021 using a variety of approaches: face-to-face on site, on the premises of the participants' organisations, online (using Skype, Zoom), mixed (phone and on-site or phone and online). Internet data research has also been used to complete the 28 study cases information, together with previous public recorded interviews, studies, reports.

The researchers in each country approached all the 28 organisations and relevant persons, conducted the interviews and analysed the data. There were no restrictions with respect to the size of the organisation or ownership. An information leaflet about the purpose and structure of the interview was used by some of researchers and informed consent was gained. Anonymity and voluntariness were ensured to participants and organisations, when requested. The interviews were conducted in the national languages (Czech, Italian, Finnish, German and Romanian) or, when appropriate, in English and all quotes provided in the results were translated if necessary.



A topic guide was developed based on the literature and covered several themes: organisational background and structure; reasons to implement the age management measures and the story of the implementation, *aha* moments, results and monitoring of results, beneficial effects of the initiative and activities that sustain the initiatives, personal recommendations.

## Description of the type of data being collected and interpreted

Our main interest was to capture the essential elements of the age management dimensions being implemented together with the personal perspective, perceptions and experiences of the individual respondents. The data were analysed using qualitative content analysis method by the help of Atlas.ti software. The process was organised according to the following steps. At first there was a familiarisation with the data, including reading of each manuscript multiple times. Afterwards, categories were generated following a deductive-inductive approach. This means that we generated categories based on previous research. In addition, we developed categories based on the interviews by the help of experts from each country involved in collecting the study cases. The next step was the coding phase of the data, the coding scheme was refined and any disagreements were solved through discussion. Using the final codebook, the interviews were analysed using Atlas.ti software.

## Results

### Overview of the organisations

The companies involved in these study cases belong to both, private and public domains and include both small and large enterprises. They operate in various sectors of activity, as shown below.

For this research, we considered the following sectors, representing a continuum of distance from the natural environment. The continuum starts with primary economic activity, which concerns itself with the utilization of raw materials from the earth, such as agriculture and mining. From there, the distance from natural resources increases (*the primary sector* of the economy extracts or harvests products from the earth, such as raw materials and basic foods; *the secondary sector* of the economy produces finished goods from the raw materials extracted by the primary economy; *the tertiary sector* of the economy is also known as the service industry; *the quaternary sector* of the economy consists of intellectual activities often associated with technological innovation; *the quinary sector* includes the highest levels of decision making in a society or economy).

Distribution of sectors for our case studies is the following:

Industry Sectors	Frequency
Secondary	10
Tertiary	8
Quaternary	6
Quinary	4

## Typology of the age management dimensions (practices)

The analysis of 28 case studies on age management programs and measures implemented in companies from five European countries (Italy, Finland, Austria, Czech Republic and Romania) of both larger and smaller enterprises in the public and private sectors revealed that there was no general trend toward integrated age management in practice. However the dominating dimension found in our study cases is '*Health protection&promotion and workplace design*'(85 distinct measures being reported), followed by '*Training, lifelong learning and knowledge transfer*' (56). In third place, we considered the '*Comprehensive approaches*'(37) and the '*Flexible work time practices*'(33).

There are substantial overlaps among several dimensions which show the general interest first focused on ageing specific problems (health is the main issue when speaking about ageing and work ability across time) and second on education and learning (another main issue related with ageing employees and changing society and work field demands).

Age management dimensions	Frequency
Health protection and promotion	85
Learning, training and lifelong learning	56
Comprehensive approaches	37
Flexible work time practices	33
Employment exit and transition to retirement	20
Job recruitment	13
Career development	12
Re-deployment	2

Inside the *Health protection & promotion and workplace design*, the most implemented active measures are the *employee participation and education and the use of health experts* (which can be the supervisors and key workers within the company) while the passive measures include most frequently the *regular health checks* and the *ergonomic workplace (re)design*.

Heath protection and promotion measures
Training supervisors and key workers in health management techniques; use of health experts
Employee participation and education
Ergonomic workplace (re)design
Regular health checks

Inside the *Training, lifelong learning and knowledge transfer dimension*, the most used measures are *The continuous monitoring of employee’s educational status* together with *systematic evaluation*, where such practices are in place and match between organizational skills needs and the employees educational status and expertise. *Using older employees and their particular qualification* is also a frequent practice, doubled by the efforts to *motivate learners* and *providing continuous learning and training support*.

Learning, training and lifelong learning
continual monitoring of an employee’s educational status; systematic evaluation
analysing the skills needs of the organisation, matching these with the available skills and individual educational status of older employees and utilising them in the methodology and contents of training
using older employees and their particular qualifications both as facilitators of further education for older and younger employees, and as an organisational ‘knowledge pool’
special efforts to motivate learners, establish methodologies and provide support

The *Comprehensive approach* is providing more of an increased awareness and knowledge about the problem of ageing at work together with other relevant aspects related such as gender. The most used measures which include the comprehensive approach are the general aim of *preventing age management problems, the overall approach on age managements*, including all dimensions and *focusing on the entire working life and age groups, not just older workers*.

Comprehensive approaches
an emphasis on preventing age management problems
a holistic approach that encompasses all dimensions of age management
a focus on the entire working life and all age groups, not just older workers

## Types of motives (challenges) for implementation of age management measures/programs

The case studies indicated several common challenges and motives for implementation of age management measures but also differences between the study cases. A complete image of the main motives reported in the study cases can be consulted in the table below.

Reasons for implementing age management program	Frequency
ageing employees	21
organizational well-being	18
personal values	18
considering the needs of employees	14
health evaluation of employees	13
holistic view	11
stimulate and retain the employee	9
knowledge transfer	4
preventing workers shortage	3
stopping the personnel fluctuation	2
communication and participating in the community	2
EU funded AM programs	1

The most dominant challenge/motives highlighted are related with the overall topic of ageing in Europe and the problems deriving from this phenomenon: *ageing employees*.

*Population aging is one of the most difficult challenges of the 21st century. The need to balance social costs has led to a rapid increase in the retirement age. As a result, many jobs which were once only done by young people are now entrusted to older workers. (ASL Roma, Italy)*

*As expected from a family business that has been in business for a long time, Saarioinen has many aging employees. (Saarioinen, Finland).*

*Because of the age structure within the organisation, the city expects approximately 3–4% of its staff to move into retirement every year. (Berner, Finland)*

*When analyzing the age, numbers and occupational groups of our employees we found out that the average age of our employees is 42.5 years, and that there is a significantly big part of people in the age group above 50 who are not given proper care [...] (Slezská diakonie, Czech Republic)*

*In AMIU Company, the 2015 data of personnel indicated an average age of almost 50 years (49.98) with a percentage close to 20% (19.5%) of over 55. Projecting the figure forward (with turnover blocked) the over 55 will be around 50% in 2020 and even 92% after another 5 years. (AMIU, Italy)*

The next significant cluster includes *organisational well-being (encompassing also the organisational culture, values and vision)* and personal values, both from the perspective of the employer and perspective of the employee. This cluster shows, on one hand, that there is always a personal or organisational perspective for implementing the new concepts and on the other hand that the behaviour of organisations is increasingly focusing on age management, including it into the current culture and value practices.

*If a company intends to remain in the market with a long-term vision and to be successful, it must have employees who are loyal and, above all, willing to work. (DPD, Czech Republic)*

*[...] awareness that the management of human resources cannot end in a mere personnel administration but implies an adequate consideration of the worker as a person living in the workplace. (Scatola, Italy)*

*Every year we try to implement a joint training activity in our organization that can unite and develop us as a team. Similar activities significantly strengthen personal relationships and connect members of management; we get to know each other better, we have common experiences, we motivate each other. (Naplno, Czech Republic)*

*These features are – on one hand, demanded by the employees themselves and others are part of our organisational culture and policy in approaching work and business. (CGM, Romania)*

*[...] the average age of workers trends towards seniors over time. Thus, there is much to be gained from implementing a strong worker well-being program, especially for aging workers and very little to lose. (Saarioinen, Finland)*

*At the same time, we also want to take responsibility for our environment, nature and the local community. (Weiberwirtschaft, Austria)*

*Considering the needs of the employees seems to play a significant role as a main reason for implementing age management measures within companies. This shows that companies are linking the productivity and work ability of employees to fulfil their needs as well as consider what specific needs are appropriate for an ageing worker. Employers gradually change their attitudes towards older workers, who are often bearers of frustration, and their loyalty and motivation are different from younger employees.*

*As an entrepreneur, when I considered making my team of lawyers and experts, I spent a lot of time thinking on the aspects related with their needs as workers and how should I approach this personnel management in a way that will make them more confident, productive and – why not – happy and pleased with their work and their working place. (AAdvo, Romania)*

*[...] establishment of good working conditions for its employees. The needs of our employees were always taken into consideration. (Krok, Czech Republic)*



*Thus, we felt the need for a project that would change the current dynamics of the labour market, by facilitating communication between employers and candidates. (Angajez 45+, Romania)*

*Feedback from the employer is mostly missing. This is exactly what we want to improve: we want to hold regular employee interviews. We want to check whether the person is employed in the right place, whether the goals for further training are realistic. (Weiberwirtschaft, Austria)*

Not surprising, the health domain also encompasses a significant number of reported reasons (*health evaluation of employees, prior health studies and analysis*).

*Health promotion in healthcare is therefore not an option, but an obligation. (ASL Roma, Italy)*

*This company deals with food, so it is particularly important that the employees are healthy. The lungs in particular need to be examined regularly, as the constant use of flour can cause damage. So here we also need well developed health care plans. (Gradwohl Bakery, Austria)*

*Key to Health is aimed at testing an intervention model technologically supported, aimed at providing workers with prevention tools and services in the field of nutrition and physical activity. (Fondazione Bruno Kesser, Italy)*

Other human resources management issues are reflecting also the reasons for implementing age management specific measures: *preventing workers shortage, preventing personnel fluctuations, stimulating and retaining employees*. We can conclude that using this approach and by eliminating the bottleneck and focusing on applying age management and effectively sharing knowledge among generations of employees, organisations will turn these trends into a performance factor and thus improve the performance of processes and the entire organisation.

*[...] the company aimed at implementing such measures that would provide appropriate care for all age groups to lower the fluctuation of employees. (Zumtobel, Austria)*

*In IT there is a high level of competition for the best human resource recruitment and the market is very dynamic. Therefore, we had to come up with additional features of the working package. (CGM, Romania)*

*With the older generation outnumbering the younger, the city sought to offset the potential future worker shortage by improving its age management practices. (City of Naantali, Finland)*

Interestingly, among the 28 cases we found two cases of *EU financed projects* for age management field, in Czech Republic.

## Reported Results

As we observed in our study cases, age management, as practiced in most organisations, focuses on several age categories and not isolating one specific age segment. Therefore, the results of the age management programs and measures are encompassing a wide range of effects. As a general observation, all the study cases reported beneficial effects of the initiatives which shows that such measures have an impact because they address issues related with work ability, age, gender and the core relationship between employees and employers. The main results reported by companies are described in the following table.



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Results	Frequency
protection and promotion of health	26
personal and professional well-being	14
adaptation of workplace and workconditions	14
maintaining the work ability	13
contiuous real time feedback from employees	13
knowledge transfers	12
promotion of age diversity	11
increase the average retirement age	10
support for motivation	9
increase the prestige of the company	9
expertise and profeciency	9
loyalty to the company	7
holistic approach	6
analysis of situations for inadequacy of work	5
redeployment of staff in difficulty	3
working with age management experts	2
organizational sustainability	1
advocacy for amending the legislation	1
creating a program of active ageing to sustain those who are inadequate at work	1
early retirements and part time working models	1

They are directly related with reasons for implementing the measures and reflect the focus of the companies in firstly *protecting and promoting health in the workplace*, including *reducing the number of accidents and occupational diseases and reducing the rate of sick leave*.

*[...] medical efficacy: through medical visits (only for workers initially at risk) and distribution of questionnaires for the evaluation of the RCV and RD2, the aim was to evaluate the medical efficacy of the package offered by FBK. (Fondazione Bruno Kesser, Italy)*

*No occupational diseases for Over 50 workers after the start of the project. No accidents for Over 50 workers after the start of the project. Reduction of the risk index relating to the activities carried out by Over 50 workers (the risk has been reduced by over 50%). The reduction in the number of accidents and occupational diseases has contributed significantly to minimizing the social and economic cost of non-safety, making the production system more efficient. Through accredited certification, that participatory approach to health and safety in the workplace is achieved which, by spreading greater awareness, makes prevention policies effective. (Tarkett, Italy)*

*The five-shift model is very important particularly for older workers, as it enables them to better maintain their health and to recover from shift work. At the same time, the model also serves to prevent work-related illnesses. Thus it also makes shift work more attractive to younger workers, which again is an advantage for BAM when recruiting on the labour market. (BAM, Austria)*

*Reduced sick leave: Berner Ltd has a low rate of sick leave, 3%, with no great difference between leave taken by younger and older workers. (Berner, Finland)*

At individual level, the most significant results reported within companies include: *personal and professional wellbeing, increase the expertise and proficiency (together with increased productivity), maintaining the good level of work ability, support for motivation, increasing the retention and loyalty of the employees.*

*I am surrounded by happier and satisfied people at work, which is a huge gain and a great comfort for me, as an employer. They are not like that only at professional level, but also at personal level. (Aadvo, Romania)*

*Everyone gets the support they need when they need it, and from whom they want. Employees have the possibility to track and take back control of their work and wellbeing. Instant feedback helps us to continuously improve the service selection, and focus on things that create true value for our employees. (Vincit, Finland)*

*Attention no longer focuses on negative phenomena, such as stress, burnout, bullying, bullying and violence, but on the positive ones: well-being, commitment, motivation, social support.*

*(ASL Roma, Italy)*

*Our expectations from any management education are always based on personal development, an added value. In this activity, we felt the possibility of a personal shift, and we also liked its overlap, that it is not only about our profession, but also about our personal lives. (Naplno, Finland)*

*At company level, significant results include implementation of specific age management measures such as: adaptation of workplace and work conditions, ensuring mechanisms for knowledge transfer, increasing the average retirement age, ensuring communication channels and programs for a continuous real time feedback from employees or offering solutions for redeployment of staff in difficulty.*

*Thanks to this we managed to define individual workplaces and recommend their adjustment in order to meet the ergonomic requirements. (TPZPK, Czech Republic)*

*Zumtobel established a new Health and Age Department specifically to investigate and manage challenges associated with the ageing of its workforce through comprehensive analyses and solutions to improve company policies and practice. (Zumtobel, Austria)*

*TreCLifeStyle seems to have been used continuously especially by the participants in the prevention pathway who perceived it as complementary to the face-to-face counselling interviews. (Fondazione Bruno Kesser, Italy)*

*Establishment of a concept of care of former retired employees as a source of knowledge, available helping capacity, and a form of expressing of respect and gratefulness. (Krok, Czech Republic)*

*The intergenerational communication improved a lot. If they know more about their colleagues, they are easily willing to help them. In this way, the generations can work together much better. When they laugh together, the generations can understand each other much better. (Gradwohl Bakery, Austria)*

*We need to create open dialogues on issues such as different age groups, occupational groups and, above all, different cultures. Through the open discussion and implementation of measures, we want to convey an understanding of the benefits for all age groups, as well as different educational or cultural backgrounds. (Weiberwirtschaft, Austria)*

At society level, we can mention *the promotion of age diversity* and definitely, *the increase the prestige of the company*. There are several study cases included in this analysis report that have been recognised as best practice models at local, regional, National and international level.

*Employee inclusion: In all planning for larger orders or restructuring, employees are involved and have the opportunity to make their contribution. (Weiberwirtschaft, Austria)*

*Enhancement of generational differences, promotion of intergenerational dialogue, enhancement of diversity as an innovation factor and improvement of the corporate climate. The work and personal experience of the worker was treated as strength and not weakness within the path. This allowed us to enhance the skills already acquired and to discover new ones going forward with the path and with the new job. (Roma Capitale, Italy)*

*Appreciation - we are campaigning for a reconsideration of the attitude towards the maturity of 45+ candidates (Angajez45+, Romania)*

*[...] the teambuilding program makes good marketing for the company – employees talk with other people – family, friends – and this is good to spread the word about CGM in the community. Thus, we become more attractive for potential employees, trainees and interns. (CGM, Romania)*

*[...] the programme won several awards, including financial awards. (Voestalpine, Austria)*

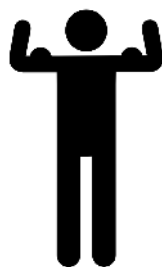
## Strengths and weaknesses

Our study cases included questions related to strengths (and weaknesses) of the implemented measures and programs in age management. This is of a particular importance because companies can identify the areas where they are successful, and look for the reasons for that success. Linking strengths to opportunities will give a boost to the companies on how to take advantage of the opportunities using the identified strengths.

The most significant strengths identified in the study cases are presented in the following table.

Not surprisingly, the most frequent strength reported in many study cases is related with *team working and communication*. Working teams are the very core of any company and they are the real value that any company is aiming to create and maintain as much as possible, in order to maximise results and profits. Great teams build each other up and strengthen individual members to create a cohesive group. By working together, employees learn that wins and losses affect everyone on the team. Teamwork necessitates confidence in each other's distinct abilities and communication skills and channels, in order to cooperate and produce the added value.

*[...] communication and cooperation within the working teams. We may not design these team building programs in a very strict and controlled way but precisely this liberty of each team to construct their own programs is the strongest point. (CGM, Romania)*





Strengths	Frequency
teamwork and communication	15
increased personal confidence and engagement in the working time	12
independence and profesiciency	10
proactive approach in health protection	9
external support	8
coordination of stakeholders	7
meeting real needs of the employee	7
company culture	6
healthier and happier employoee	5
project visibility, company visibility	5
increased productivity	4
diversity of measures	4
involvement of managers	4
knowledge and experience of older workers	4
fast results	3
loyalty	2
positive attitude towards active ageing	2
addressing all ages - age diversity	2
law sustained	2
increased service quality	2
financial savings	1
easy training programs	1

*Mutuality increases, thus communal spirit and commitment to the workplace deepens. (Vincit, Finland)*

*...the involvement and participation of all workers, all have proved very collaborative towards changes, testing of machinery and Personal Protective Equipment etc. (Tarkett, Italy)*

*The strongest aspect of the program was the courage to bring certain topics into the discussion, the topics that haven't been and are not included in the education system of workers in social services, while they are very important for them. (Slezská diakonie, Czech Republic)*

*The work on our way towards age management included all team members, it was very integrative and teambuilding. The results were so positive that we would definitely do it again. (FBZ, Austria)*

*The working atmosphere is good; people are joking and kicking together, even while working! (Weiberwirtschaft, Austria)*

*Increased personal confidence and engagement in the working time and independence and proficiency are other significant strengths which complete, at a personal level, the effects of age management programs and measures for individual employees.*

*Employees can work their own pace and this makes them feel more comfortable at work and increases efficiency, productivity and responsibility. (CGM, Romania)*

*The survey was a big success, the employees were very proud to be asked for personal satisfaction with their workplace, workload and their ideas. The mood in the whole company grew essential. (Gradwohl Bakery, Austria)*

*We understand that giving people responsibility and freedom at the same time, integrating work and personal life, will have a positive impact on both sides (DPD, Czech Republic)*

*Our employees feel valuable. They like to work; their identification with the workplace is very high. (Weiberwirtschaft, Austria)*

*They work as they were trained and they completely understand the working process approached by the office, increased efficiency, increased independency to fulfill complete jobs for specific clients (they only need supervision in exceptional cases) (Aadvo, Romania)*

We notice that a third important place is represented by the *involvement of others – stakeholders, managers and the external support* that many companies have during the implementation process. Such stakeholders include external agencies and/or experts in age management and also financial support. Importance of management support is obvious and many companies reported as a great strength the fact that the age management programs have been sustained also by the managers & key people, which were perceived as closer to the employees and *meeting their real needs*.

*[...] having an external partner regarding safety at work, with which we experimented, who believed in us, who was sensitive to the initiative, indeed it continues to be, which in our case is a private body, called Progetto Salute, but which acts as a competent doctor who has collaborators on a plurality of companies and who therefore wanted to invest in this space. (Fondazione Bruno Kesser, Italy)*

*Coordination of stakeholders: open discussion of age-related issues between management and workers during the performance review process. (City of Naantali, Finland)*

*We have great cooperation with experts in the field of the AM implementation in organisations. We were continuously consulting our individual steps and processes with them. (Krok, Czech Republic)*

*Without the grant, we could not afford to implement many activities consisting of sub deliveries by professional companies. In other words, thanks to the project financed by the European Social fund we managed to avoid realisation of some parts of the project ourselves, in an inexperienced way. (TPZPK, Czech Republic)*

*The positive thing is to continue to reflect and grow on this topic, to spread these concepts, and then to make the workers protagonists because they themselves could be promoters of good practices even simply by stopping and making suggestions in this box. Each worker could give a contribution. (Scatola, Italy)*

*Thanks to the activities in the program we managed to reflect the situation in the organization and map the readiness of the organization to work with people 50+ and based on the needs of this age group to set the ways of social services provision in the coming years. (Slezská diakonie, Czech Republic)*

On the other hand, weaknesses of the age management measures were much less reported (there were several study cases that mentioned the fact that no weakness of the program has been identified) and are less homogenous than the strengths. We consider this finding as being normal, weaknesses are addressing much more to specific particular contexts of each company, therefore they are much more related with specific issues and particularities.

We could identify some common aspects related with *high costs which are not reflected directly into work* and they don't always yield short-term returns. Sometimes, training and upskilling employees *takes a lot of time* and is, by itself, *time consuming and effort consuming* for the employees. If they are involved in such training while working (in shifts, for example) this may result in overload and burn out. On the other hand, there is no guarantee that the staff trained will stay with the company. Investing in a training program is risky because the company may devote resources toward improving the skills of personnel who don't stay with that company long enough to recoup the outlay. Also, some specific age management measures such as flexible working time can generate *low levels of predictability for time management*.

Weaknesses	Frequency
costs not reflected directly in the work	6
long time for training and upskilling	4
time consuming for employees	4
risks of losing trained employees	2
lack of software support	2
lack of time management predictability	2
needs that you are not aware off may stay hidden	1
difficult to involve new employees	1
oversized activities within AM	1
high expectation of the employees	1
missunderstanding of work from home concept	1
measures not pplied in every department	1
doubt on openness and sincerity of employees	1
personal natural feelings of older employees	1
training no longer sustained	1
lack of preparation	1
employees overwhelmed	1
creating smaller closed teams	1
low range of worklife span for older workers	1
slow pace of implementing the program	1
more feedback required	1
lack of practical approach in training	1
the flow of information is sometimes very slow	1
a top-down model depends on management abilities	1
only full-time employees consistently receive supplementary training	1

A negative point is definitely the fact that the costs have been totally supported by the company. (Tiger, Italy)

*The whole process cost a lot of time and money. The company cannot afford to do that regularly. Profits in the bakery sector are very low. Probably in about 10 years the company plans to do it again. (Gradwohl Bakery, Austria)*

*In other companies that are as small as we are, not as much money is spent on it.*

*(Weiberwirtschaft, Austria)*

*Flexibility towards employees makes planning difficult for the management.*

*(Weiberwirtschaft, Austria)*

*It takes a long time to achieve a complete training process (in our case, minimum 1 year); there is no guarantee that an employee, once trained, won't leave and you will not also benefit from the long training period. (Aadvo, Romania)*

*Social workers have regular mandatory training. In this program the age management activities have been added to it, which was rather time consuming. (Slezská diakonie, Czech Republic)*

*[...] The training was given at the beginning but was stopped due to management problems. (Roma Capitale, Italy)*

### Monitoring systems

The monitoring means and arrangements are varying a lot from a company to another. A possible explanation is related with the fact that these monitoring systems are connected with the general monitoring setup within each company and they were not necessarily specially designed to measure and monitor the age management measures. In some case studies, this aspect is clarified but in other cases we understand that the age management measures were included in the general human resources routine evaluations or in annual reports of the companies.

However, the most used systems of monitoring include *surveys and questionnaires, studies and data analysis* (including monitoring of very specific indicators such as *hours of training or fluctuation personnel rate within 12 months*), *semi-structured interviews, direct feed-back from employees.*



Monitoring	Frequency
surveys and questionnaires	13
studies and data analysis	10
semi-structured interviews	4
direct feed-back	3
assessment of impact	3
self-evaluation	2
experiments	2
individual evaluations	2
digital health and well-being survey tools	1
observation	1
personal manual	1
anonymous post-box	1
guided workshop	1
external monitor	1
annual reports	1
market studies	1
internal monitor	1
board meetings	1
personal records	1
quality check	1
surveys created by the employees	1
informal meetings	1
complete system of monitoring and evaluation	1
specific indicators (balance sheets)	1

There were some specific interesting monitoring systems such as *experimental designs*, especially used for implementing health measures in some specific Italian companies:

*The control group (33 people) was checked before and after the project, then 6 months later. 10 of these people (sample group), in these 6 months, have followed a healthy diet prescribed by a nutritionist and carried out about 48 sessions of physical activity. The sample group significantly improved eating habits, the control group became aware of the lifestyle of the sample group. (Tiger, Italy)*



*The project did one, two, official experiments ... then actually we did 2 more. In these 4 experiments, we monitored with a mixed of methods which included rigid tools such as questionnaires and individual interviews but also medical measurements and tests (Fondazione Bruno Kesser, Italy)*

A certain particular case of monitoring is described by Vincit company (Finland) where a specific tailored system has been put in place by the help of employees themselves. Based on this monitoring system, Vincit built their human resources assistance according to the specific needs and values of their employees and won the Best Workplace in Europe award, according to the Great Place to Work Institute, in 2016.

*[...] Traditional standard questionnaires did not seem to have enough tools for this to work and it was decided to create the whole survey together with the employees. Using the Surveypal - tool all parts of the project were easily created. Using the tool employees suggested and voted on themes important to them under the topic of workplace well-being and commented on theme questions. When this processing part was completed, Vincit implemented the official survey with the same tool that was by now very familiar for all. The answer percentage was a full one hundred - the questions were clearly seen as meaningful and there was a clear desire to get involved. (Vincit, Finland)*

## Personal recommendations

We discovered a great diversity of personal recommendations in the study cases. The key persons interviewed have referred to various aspects related with the age management topic. The multitude of recommendations shows on one hand the complexity of the concept and on the other hand the accessibility for implementation – the more concrete a concept is, the easier to be implemented and therefore receive/give recommendations about it.

Personal recommendations	Frequency
considering the needs of the employee	11
consider the needs of older (55+) workers	8
enhanced occupational health care service provision	6
raise awareness	6
learn from best practice and experts	5
sharing skills	4
active involvement	4
use a large team	3
transferability	3
consider the late career management	3
attention to change	2
training of management in work ability issues	2
developing skills	1
make people meet and talk	1
value of older workers	1
include all dimensions	1
enjoy the process and have patience	1
considering all age categories	1
promote specific measures of transition	1
enhanced communication	1
suitable for small organizations as well	1
funding support	1

Almost all recommendations which consider the relationship between employer and employee are advising for an employee-centred approach. This means to *take into consideration the needs of the employees* (a large number of respondents referred specifically to *the needs of older employees, 55+*) but also the relationship between the employees and employers, aiming at a balance between what both parties can offer. Several ideas focused on considering the employee a person, an individual, a human with a life beyond the work life and encouraged employers to try and see the whole picture, giving up seeing the employee just as a resource they can *use*.

This recommendation goes hand in hand with the active involvement of the employees in the process of their transformation and adaptation to the workplace. Contribution of each worker and creating a team spirit are viewed as significant conditions for success.

Some of the respondents pointed out that there is still a great need to raise awareness and knowledge about the concept of age management and the importance of considering late career management strategies.

There are also very specific recommendations and very inspiring, easy to understand and to explore: considering all age dimensions and all age categories, paying attention to change, considering transferability (no one is inventing the wheel...), sharing the skills, making people meet and talk, enjoying the process and being patient.

Learning from best practices and experts (including books) was a recommendation that reminded us that the very utility of study cases such as those proposed by this project are meant to inspire, help and offer a learning resource for all those willing to implement age management measures in their companies and in their lives.

### The Aha moments – revelations and insights

One of the aims for the interviews that formed the base of the study cases was to catch the personal vision and experience of the respondent as they experienced it during the age management implementation process. This gives a real feeling from the field and makes a stronger impression for anyone willing to understand how this concept can be put in practice.

The AHA moments captured in the interviews are referring to those exact moments when an important insight has enlightened the path and increased the insurance that this was the good road for implementing age management measures. These “moments that matter” may also represent significant opportunities for organisations to offer a more satisfying experience, foster positive perceptions of the company and produce meaningful outcomes.

Analysis reveals that despite the heterogeneous profiles, measures, and contexts, the 'revelation' moments are actually agglutinating to some key elements: *results of a specific measure*, the moment of *discovering the problem(s)*, experiences of *personal satisfactions* (both as employers and employees), implementation of specific measures.

AHA moments	Frequency
results of a specific measure	13
discovering the problem	9
personal satisfaction	5
implementing a specific measure	3
continuous process	2
no aha moment	2
power of raising awareness	1
importance of health and safety	1
advantages of older (retired) workers	1
this is NOT something new	1
AM can apply to all types of organization	1

Realising that measures taken actually work and even have unexpected positive results/effects is the most significant aspect embedded in this category. References of measures include understanding the needs of the employees and responding adequately to them, very useful comparison experiences, surprising concrete effects such as increasing productivity or total absence of sick leaves, making the voice of the employees heard and involving them actively boosted companies outcomes.

*The Disk-test has helped to understand needs for improving one's own interaction skills and also interaction styles with colleagues and clients. This has seen great improvements in ease of communication and in completing work tasks better. (Vincit, Finland)*

*The meetings were a very useful comparison experience to substantially modify all those bad habits (AMIU, Italy)*

*It turns out that for those doing shift work, having your voice heard when your working hours are planned is very valuable. [...] Hearing these needs does not hurt the company's bottom line at all. What it does do, is create a sense of community at the workplace, which has numerous small benefits that are hard to pinpoint in numbers. (Sastamala, Finland)*

*We realized that money is not the most important motive for working in our company. (AEQ, Czech Republic)*

*[...] we never expected that they wanted to get actively involved in order to improve their workplace and actually work even faster (Gradwohl Bakery, Austria)*

*Discovering the problem(s) was the next important moment of insight – by the help of age management studies, analysis, evaluations, many employers tackled issues, problems that were hidden and after being revealed, could be addressed and solved.*

*The results of the analysis led to the writing of the project. (Tiger, Italy)*

*We have realized that the employees want to be heard, they really want someone to listen to their opinions, remarks, and proposals. They want to be part of the team. (Krok, Czech Republic)*

*Over time we have realized that this is mainly a fault of superiors, and that it is equally necessary to work on our managerial and leadership competencies. (AQE, Czech Republic)*

*The employees felt important, valued. They were asked about their opinion for the first time! They started talking to each other and wondered what could be done or organized better at work and how they could help each other! That was a big surprise for us at management level. (Gradwohl Bakery, Austria)*

*The personal satisfaction of respondents (who are key persons in their organisations) is nothing else than a subjective and personal reflection of the involvement for achieving the results and positive effects described above as significant aha moments. It describes those vibes and positive attitudes that cannot be encompassed in objective indicators but may represent a very effective clue for understanding the success of the implemented age management programs.*

*I have a moment of personal satisfaction each time we succeed to help a client because if you like what you do, every effect of your working makes you happy and satisfied. (Aadvo, Romania)*

*[...] I have gained the trust of people and they already trust that when I do something, it is in their best interest. (DPD, Czech Republic)*

*We were highly surprised and are also very proud of the level of job satisfaction in our organization. This gives the management the task of continuing the chosen path. (FBZ, Austria)*

## Conclusions and discussions towards recommendations

Taking a closer look at the age management measures that were implemented, we identified a broad variety of practices across the cases. The results showed that measures supporting the work ability of (ageing) workers encompassed several dimensions such as recruitment, training, career development, flexible working practices, health promotion, redeployment, employment exit, or comprehensive approaches.

The results showed that many organisational measures aimed at decreasing job demands and were thus accommodative. The most widely used measures related to work time arrangements. Reduced working hours and work shift arrangements were commonly used in all countries, and job alternation leave were additionally used in the Finnish and Austrian organisations. These measures were seen to enhance employees' recovery if the work itself or the life situation of the employee were demanding.

In the study cases, some measures were proactive while other measures were used reactively after employees' work ability had already weakened or after the companies encountered an age problem within the employees/existing workforce. For example, the measures related to job modification (modification of tasks, work time arrangements) have been used reactively in many cases. Accordingly, in some cases employees' tasks were changed to be less demanding by replacing some part of clinical work with office work. Redeployment had also helped to bring those employees back to work that had been on long and expensive sickness leaves due to impaired work ability.

We found variations in age management approaches across both organisations and countries but one main conclusion is that all types of organisations, regardless of their size, business orientation, and whether they are local or international, can derive benefits of age management. While the approach to age management may vary across organisations depending on whether it is the employer's internal branding or response to the crisis, age management can be a strategic initiative to growth.



# Methodology recommendation for age management implementation

## Benefits of age management

In our aim for providing essential recommendations and suggestions for actions, we will consider *three age management areas of importance*, encompassing individual level, organizational and societal level. These three themes emerge clearly from the study cases but are also interconnected and follow a developmental reasoning.

*The Individual:* empowerment to it and well-being. Observed key aspects:

- for age management to be truly successful in any given organization it needs to encompass all age groups and provide age-specific support and incentives;
- work ability and job satisfaction appear to be two obvious key elements;
- the individual motives and considerations for continuing to work are relevant (health in relation to the work situation, personal and professional wellbeing and proficiency at work, opportunities for social inclusion, opportunities for meaningful and self-crediting activities);
- promotion of creativity, motivation by self-crediting activities, lifelong learning and development.

**Specific action an individual can directly benefit from:**

- **take advantage of training and lifelong learning opportunities;**
- **take stock regularly of their own training and career development requirements.**
- **learn about own capacity and workability.**

*The Company:* managing human resources to raise awareness and implementing best practices of age management in recruiting, training development and promotion, flexible time working, etc., in order to age adjust the workplace and retain more efficient employees by means of customized management. Observed key aspects:

- productivity and the budget: introduction of measures for economic security by promotion of the individual's employability;
- the risk of work environmental injuries and diseases increases with age => improvements in the physical work environment: promotion of good work health by measures in the design of the physical work environment and the mental work environment, with sufficient recovery and appropriate working hours and pace;
- exploiting more the experience and mentorship: importance of having a transfer of knowledge between the elderly and the younger employees, a mentorship Experienced healthy 50 year olds, optimal age.

**Specific actions an organization can benefit from:**

- **knowledge of precise workability of employees as a base for all further planning;**
- **recognize the implications of an ageing workforce and develop age awareness throughout the organisation;**
- **implement best practices of age management in all dimensions;**
- **create conditions in which employees can manage their own careers and ageing;**
- **disseminate examples of good practice as part of promoting positive approaches/attitudes to age management.**

*The Society:* has a macroeconomic perspective associated with labour market policies, policy-makers and governments in an effort to prevent age discrimination and reduce demographic challenges. Observed key aspects:

- contemporary policies and practice in the work environment;
- social inclusion and attitudes: the notion that age is an obstacle is, above all, a mental obstacle; changing attitudes to older workers;
- social support and active participation, increase diversity among managers, the organisations and society.

**Actions** - there are several key dimensions for which policy makers/governments have a crucial role:

- 1. Education:** public education to counteract negative images of older workers and the promotion of lifelong learning.
- 2. Employment policy:** active labour market policies designed to enable older workers to remain in or return to employment, and the promotion of quality employment for this and other age groups.
- 3. Pensions and social security policies:** introduction of specific measures for transition and exit together with promotion and effective incentives for the use of such policies.
- 4. Inclusion of older workers:** encourage employers to establish comprehensive action programmes on age and employment by publishing good practice guides and disseminating age awareness literature.

**European Union** in particular has an importance by directly financing or subsidising initiatives, regulating the labour market or society in general, opposing age barriers and/or providing encouragement to employers.

**Actions to be considered:**

- disseminating of examples of good practice and encouraging the transfer of knowledge between the Member States;
- eliminating age barriers from the Commission's own recruitment practices;
- ensuring that the new European Social Fund makes older workers a priority group;
- ensuring that the needs of older workers are adequately reflected in the Employment Guidelines and Equal Opportunities policies;
- introducing a new European Code of Good Practice in employment of older workers.

## Conclusions ... to conclusions

It is not hard to approach a good integrated age management strategy if it is starting from where research on sustainable working life meets the real problems faced by employees and managers.

Such knowledge emerges from a thorough assessment of employee workability that provides a base for any further measure implementation. Even though not many organizations in our collection have begun their process by measuring their workability index (WAI), it is obvious that only the process based on data will provide measurable results. However, the introduction of age management itself is important.

After this comes a number of practical aspects that must be handled, which differ according to the conditions of different organizations, as well as of the individual positions.

Thus, the key to successful age management is a customized integrated strategy. Following one of the respondent's recommendations, enjoying the process and giving it time to develop and grow is also essential.

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## Annexes

On the following pages you can find the word cloud images generated by the Atlas.ti software during the analysis. Each cloud depicts a set of words of different size based on the frequency of its appearance in each case study.







## CGM Software, Romania



## Vincit, Finland



## Roma Capitale, Italy





## Bruno Kesser Foundation, Italy





## Tiger Flex, Italy





# Istituto Zooprofilattico Sperimentale del Lazio e Toscana, Italy



## Azienda Municipalizzata Igiene Urbana, Italy



## Sastamala Municipality, Finland



## Direct Parcel Distribution CZ, Czech Republic



## KROK - therapeutical community, Czech Republic



## Saarioinen, Finland



## Borealis Agrolinz Melamine, Austria





# Territorial Employment Pact of Pardubice region, Czech Republic



## AQE advisors, Czech Republic



## Sonnentor, Austria



## Berner, Finland



## Zumtobel Group AG, Austria

A word cloud visualization of terms related to age management implementation. The words are arranged in a non-linear fashion, with varying sizes and colors. The largest word is 'management' in dark red. Other prominent words include 'employees' in dark red, 'company' in yellow, 'work' in red, and 'age' in dark blue. Smaller words include 'zumtobel' in green, 'lighting' in blue, 'ability' in green, 'group' in blue, 'department' in orange, 'health' in blue, and 'comprehensive' in blue.

management employees  
zumtobel  
lighting ability company  
work age group  
department health comprehensive

## Voestalpine, Austria









## Sheltered housing Naplno, Czech Republic



## Angajez45plus, Romania



## Frauenberufszentrum Oberpullendorf, Austria



## Bio Vollwertbäckerei Gradwohl , Austria









## Age Management Masterclass

The project has been implemented by:

ProEduca, Czech Republic

Archivio della Memoria, Italy

ASIE, Romania

Sastamala Community College, Finland

Frauenberufszentrum Oberpullendorf, Austria

