A European Age Management Network: the way forward?

EQUAL - European Social Fund

EUROPEAN AGE MANAGEMENT NETWORK: THE WAY FORWARD?

PRELIMINARY RESEARCH AND ANALYSIS

EQUAL - EUROPEAN SOCIAL FUND

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CONTENTS

EXECUTIVE SUMMARY

Introduction

This document has originated from an invitation to explore the idea of establishing a European Age Management Network built on the experience of the European Social Fund (ESF) EQUAL programme. The invitation comes from the organisers of the Competence 50+ 2007 conference which is due to be held in Gothenburg, Sweden on 18-20 June 2007. It is also supported by the EQUAL Unit at DG Employment, Social Affairs and Equal Opportunities, who have commissioned GHK Consulting Ltd to prepare this paper within the framework of the European thematic assistance for the Adaptability pillar of EQUAL.[1]

Understanding the term 'age management'

Age management is on the tip of the 'European tongue', however one commonly accepted definition of this term is difficult to find. Despite there being no single definition of age management, there seems to be a common consensus as to what is implied by the term and its other related concepts. This is apparent in the ideas and measures presented in various European documents, project descriptions[2] and research papers in the field. Based on this consensus, it is possible to present age management from three different levels: individual, enterprise, and labour market policies and frameworks.

European actors, policies and initiatives: a favourable context for the network?

Demographic change

Europe, along with other parts of the world, is undergoing a process of demographic change. The population is ageing due to reasons of a decline in the birth rate below the population replacement rate, the ageing of the baby boom generation, and the increase in life expectancy achieved by progress in medicine and the absence of major military conflict in post-war Europe.[3]

The European Commission has sought to identify the challenges posed by demographic change and set in train the development of policies and measures to address these. Their work includes the 2005 Green Paper "Confronting demographic change: a new solidarity between the generations", the consultation that followed the publication of this paper, and the Commission Communication "The Demographic future of Europe – from challenge to opportunity" that summed up conclusions from the consultation process.

Lisbon Strategy

The renewed Lisbon Strategy on Growth and Jobs (2005) focuses on similar themes, and largely echoes the thinking in the above-mentioned Green Paper and Commission Communication. Whilst lamenting the insufficient delivery on the original 2000 Strategy, the Commission states

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[1] GHK Consulting Ltd are the appointed European thematic experts for the Adaptability pillar of the EQUAL programme. For further information on GHK Consulting Ltd's preparation of this paper and/or the EQUAL programme in general, please contact: Helen Tubb: Helen.Tubb@ghkint.com or Sophie Servagnat: Sophie.Servagnat@ghkint.com.

[2] See for example what is implied with Age Management in the descriptions of EQUAL Adaptability projects working with the "age" sub-theme on ECDB

[3] Communication from the Commission 'The Demographic Future of Europe – from Challenge to Opportunity' COM (2006) 571 final, pp.3-4; V. Spidla, opening address to the "First Forum on Europe's Demographic Future", p. 2, 30-31 October 2006.

that the renewed Strategy is as crucial as ever, given the widening growth gap between the European Union (EU), and North America and Asia.[4] And as far as age management related issues are concerned, the renewed Lisbon Strategy states that both businesses and the workforce have to become more adaptable to the requirements of a modern, dynamic economy and be given the right conditions in which to do so, i.e. through regulatory arrangements supporting older employees in the labour market, lifelong learning provision to ensure their input remains (increasingly) productive, and social security provision (mainly pension schemes and health care) that makes it financially advantageous as well as physically possible to remain economically active for longer.

European Employment Strategy

The European Employment Strategy (EES) is the main vehicle for implementing the employment objectives of the Lisbon Strategy. Since 2003, the EES has been presented in the form of Integrated Guidelines for Member States' employment policies – guidelines that were especially reviewed and revised to facilitate the refocusing of the Lisbon Strategy in 2005. Whilst a number of the guidelines are applicable to all age groups, the following identify how Member States are to achieve the Lisbon objectives relating specifically to age management:

- Guideline No 17: Implement employment policies aimed at achieving full employment, improving quality and productivity at work, and strengthening social and territorial cohesion. To do so in the case of older workers, policies should contribute to achieving an average employment rate for the EU of 50 % (for 55 to 64 year olds) by 2010.

- Guideline No 18: Promote a lifecycle approach to work

- Guideline No 21: Promote flexibility combined with employment security and reduce labour market segmentation, having due regard to the role of social partners

- Guideline No 23: Expand and improve investment in human capital

A number of targets and bench marks were spelled out within the framework of the EES, of which the following two are the most relevant for age management:[5]

- Achieving an increase by five years, at EU level, of the effective average exit age from the labour market by 2010 (compared to 59.9 in 2001).

- Ensuring that the EU average level of participation in lifelong learning should be at least 12.5 % of the adult working-age population (the 25 to 64 age group).

According to the most recent Joint Employment Report, Member States' progress on achieving the above is slow and variable.

European Social Fund (200 –2013)

The European Social Fund (ESF) is the main financial instrument aimed at implementing the EES, including the specific target of increasing the employment rate of the over-55s to 50% by 2010. The ESF provides funding under a range of priorities, of which the following are the most directly relevant to age management:

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[4] Communication to the Spring European Council "Working Together for Growth and Jobs: A New Start for the Lisbon Strategy", COM (2005) 24.

[5] Council Decision of 12 July 2005 on Guidelines for the employment policies of the Member States, (2005/600/EC), p. 7.

- Increasing adaptability of workers, enterprises and entrepreneurs

- Enhancing access to employment and the sustainable inclusion in the labour market

- Expanding and improving investment in human capital

Other programmes and initiatives

Other programmes and initiatives deserve mentioning in relation to age management, namely the ESF Article 6 Innovative Measures, Mutual Learning Programme and new Lifelong Learning Programme.

Existing European networks

Initial research has revealed a number of European networks focusing on age management and/or ageing issues. These include the Silver Economy Network of European Regions (SEN@ER), European Older Workers People's Platform (AGE), International Federation on Ageing (IFA), European Federation of Older Persons (EURAG), International Federation for Associations for Elderly People (FIAPA) and Eurolink Age. Looking across these networks, it is possible to make a number of observations in relation to their thematic focus, activities, membership, and management and resources. All of these observations should help to ensure that the European Age Management Network does not reinvent the wheel!

EQUAL: a potential source for the network?

According to the EQUAL Common Database (ECDB) descriptions, around 210 out of 3,616 Development Partnership (DP)s (or around 6% of all EQUAL partnerships) were/are working with issues related to age management across both EQUAL rounds.[6] The percentage of the EQUAL partnerships dealing with age management has grown from 4% in the first round to 7% in the second. The actual number of DPs dealing with this theme has doubled in the second round (from 66 to 144).

The DPs funded under the Adaptability pillar (thematic fields 3E and 3F) are the primary focus for this document. Overall, there are 866 Adaptability DPs, representing 24% of all EQUAL partnerships. 84 partnerships (or around 10% of all Adaptability partnerships) are/were dealing with the issues of age management. Of these, 55 are presently active, developing their deliverables and products under the second round.

Outcomes and messages from the first round

The main age management areas addressed by the first round DPs were:

- A lifecycle approach to working life

    o Changing employers' attitudes to age

    o A working life cycle perspective for human resources

    o Keeping workers healthy and safe

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[6] Some ECDB descriptions use age management related keywords, but the DPs do not actually relate to age management. This issue was taken into account in the calculation of the number of age management DPs by allowing for a margin of error. Therefore the numbers of age management DPs calculated across the programme and for the various thematic fields (except for the Adaptability thematic fields in the second round) are estimates.

- o Mobilising all stakeholders

- Crossing the generations

    - o Promoting links between generations

    - o Developing and applying innovative intergenerational tools

A range of key messages and good practice examples emerged from the DPs in these areas. Moreover, there were a number of coordinated European thematic activities, including the EQUAL@Work working group, an Agora conference, and various dissemination products and publications.

Patterns and trends in the second round

The 55 age management DPs (in the second round of the Adaptability pillar) have been analysed in relation to the three themes of the Competence 50+ 2007 conference. From this analysis, it can be said that operational objectives under conference theme 1: Learning and qualifications are the most prominent amongst the age management DPs: there are at least 95 instances where DPs are addressing objectives in this field, 65 instances under theme 2: Workplaces in change, and 30 under theme 3: Altered conditions and attitudes in the labour markets. As expected, the assessment reveals that the DPs are addressing multiple operational objectives, in some cases cutting across the themes.

Most of the age management DPs are active in developing measures to support SMEs (39%). The second most popular scope focuses on one or more particular regions (31%), followed by a sectoral approach (25%). Finally, actions intended to help large enterprises only amount to 5%.

The age management DPs target their activities and measures at a wide variety of beneficiaries. Unsurprisingly, the target group most often mentioned in the DP descriptions is older workers (32%), with quite a large proportion of DPs specifying that their measures are intended to support and empower older female workers specifically (11%).

The DP analysis clearly reveals that training and vocational training (34%) are the methods most often used by the partnerships working with age management. Positive promotion and awareness-raising campaigns and/or activities are the second most widely used method (20%).

DPs also employ a wide variety of tools to take forward the issue or solve the problem(s) that they are addressing. Various pieces of research, evaluations, studies and articles (17%) constitute the most prominent tool. The second most common tool is the development of methodologies or guides (16%).

National Thematic Networks on age management

National Thematic Networks (NTNs) have been the main vehicle for DPs to collaborate and disseminate their work at the national level. They have been set up by the EQUAL Managing Authorities and National Support Structures, and lead/animated in varying degrees by the DPs themselves. The NTNs have covered a range of thematic areas, some linked to Adaptability broadly, others focusing on more specific topics. According to the information available, there have been three Round 1 and four Round 2 NTNs focused specifically on age management issues. In addition, there have been four Round 1 and two Round 2 NTNs that have looked at lifelong learning, which one can assume involved issues relating to learning for older workers.

Conclusions

In answer to the question headlining this paper, there are good indications that a European Age Management Network provides a way forward. On the supply side, managing the challenge of demographic ageing is high on the EU policy agenda, with clear challenges and priorities in a

number of areas. On the demand side, the EQUAL DPs provide a significant source of ideas and actions in the age management field, focusing on many of the EU challenges and priorities identified. Morover, they focus on innovative, transnational and partnership-based projects, thereby offering new age management solutions that will undoubtedly be of interest to actors and organisations seeking to address EU 'policy challenges', as well as implementing the EES guidelines and new ESF. From both sides, there are a range of organisations and individuals who could potentially benefit from and/or contribute to the network.

However, the main caveat to this positive statement is that the success or failure of a European Age Management Network very much depends on the strategic and operational details. If the network does not have clear objectives, is not adequately resourced and managed, or does not actively engage its members – to name some of the many challenges! – then the network is bound to failure even if the supply and demand conditions are deemed favourable.

In taking the network idea forward, it will be important to discuss and agree upon the following strategic and operational aspects of the network: name, aims and objectives, thematic focus, activities, management and resources, financing and membership. It also worth reviewing the network in relation to other existing networks so as to ensure added value.

To conclude this paper, it is worth setting out a number of 'next steps', namely to.

- Establish a working group of people/organisations who are interested and willing to help develop the 'network idea'.

- Discuss and review in detail the contents of this paper, identifying areas that need further exploration and/or clarification

- Discuss and agree upon the strategic and operational aspects of the network, as listed above

- Draw up a 'Network Declaration' and 'Action Plan' setting out the strategic and operational aspects of the network

- Draw up a mailing list of people/organisations who wish to be kept updated about the network developments and could at a later stage become network contributors/members

- As a priority issue, identify the means of financing the network

It is hoped that these steps will be discussed and taken forward during the Competence 50+ 2007 conference.

1. INTRODUCTION

1.1. PURPOSE OF THIS DOCUMENT

This document has originated from an invitation to explore the idea of establishing a European Age Management Network built on the experience of the European Social Fund (ESF) EQUAL programme. The invitation comes from the organisers of the Competence 50+ 2007 conference which is due to be held in Gothenburg, Sweden on 18 to 20 June 2007. It is also supported by the EQUAL Unit at DG Employment, Social Affairs and Equal Opportunities, who have commissioned GHK Consulting Ltd to prepare this paper within the framework of the European thematic assistance for the Adaptability pillar of EQUAL.[7]

As a starting point, it is possible to consider the prospect of a European Age Management network from three different perspectives:

- *Demand* - What age management policy and practice problems are there that the network could address? Are there policy makers and practitioners who would be interested in what the network does? Would these actors find a network – as opposed to other types of action – beneficial? etc.

- *Supply* - Is there a good source of activities, information and ideas to populate the network (and ultimately respond to the Demand)? Who could contribute to and/or be actively involved in the network? etc

- *Strategic and operational aspects* - What would the network do exactly? Who would the network members be? What would be its aims and objectives? How would it operate? etc.

Framed by these perspectives, the aim of this document is to provide initial research and analysis of the *Supply* and *Demand* perspectives. It does this by presenting the current policy and practice developments in relation to age management and ageing issues at the European Union (EU) level (Section 2), as well as a detailed assessment of the EQUAL Development Partnerships (DPs) focusing on this thematic area (Section 3). Moreover, it seeks to identify and draw some preliminary conclusions on the links between the European age management debate and EQUAL activities as a potential basis for the establishment of a network (Section 4).

The intention is for this document to be used as background/reference material when presenting the idea of a network at the Conference 50+ 2007 conference. As such, the document will not examine in any great depth the third perspective on the *Strategic and Operational Aspects* of the network. Rather, it is hoped that the seminar will provide an opportunity to discuss this perspective directly with the conference participants (within the framework of a dedicated seminar on the morning of 19 June).

Finally, please note that 'European Age Management Network' is a working title to describe the prospect of establishing some kind of cooperative structure, focusing on ageing issues at the European level. Thinking around the specific focus, nature and scope of the network should therefore not be limited by this title – it is merely a starting point for discussion.

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[7] GHK Consulting Ltd are the appointed European thematic experts for the Adaptability pillar of the EQUAL programme. For further information on GHK Consulting Ltd's preparation of this paper and/or the EQUAL programme in general, please contact: Helen Tubb: Helen.Tubb@ghkint.com or Sophie Servagnat: Sophie.Servagnat@ghkint.com.

1.2. UNDERSTANDING THE TERM 'AGE MANAGEMENT'

Age management is on the tip of the 'European tongue', however one commonly accepted definition of this term is difficult to find. It is employed in a variety of contexts and refers to a broad range of issues and measures. It is also ideologically linked to a number of other terms and concepts - *ageing population, demographic change or ageing, active ageing, management of all ages, diversity management, anti-discrimination*, to name just a few. This section aims to aide one's understanding of age management by sketching out the most common contexts, issues and measures that the term brings up.

1.2.1. Three levels

Despite there being no single definition of age management, there seems to be a common consensus as to what is implied by the term and its other related concepts. This is apparent in the ideas and measures presented in various European documents, project descriptions and research papers in the field. Based on this consensus, it is possible to present age management from three different levels: individual, enterprise, and labour market policies and frameworks.

Individual

One can look at age management from the point of view of measures specifically targeted at the *individual* to remain employable, open and adaptive in the labour market by continuously updating her/his skills and attitudes in older age.

Interestingly enough, there is no specific agreement (only an approximate consensus) on when an individual enters the 'at risk' category. Assessment can therefore only be based on the subjective perception of when the discrimination or exclusion on the grounds of age starts, or on a randomly chosen age threshold set according to the needs of a specific project or study. Setting an age threshold in itself may constitute the grounds for discrimination – constructs like 45+, 50+, over 60 or retirement age may serve as an exclusion factor for the persons below these thresholds, while making assessment 'subjective' may raise the question of when and if at all the discrimination starts and who decides this.

It is important to recognise that age management at the individual level concerns not only those people in work, but also those out of work who have the potential to (re)integrate into the labour market. Current EU figures show that the employment rate of older people is still below target (Section 2.3), meaning that a significant 'target group' for age management measures are the older unemployed – for example, people who have been made redundant during restructuring, decided to retire early, or been long-term unemployed since their younger years.

Enterprise

Age management can also be looked at from the point of view of human resources within an *enterprise*. A company's interest in managing the ageing issue usually emerges as part of restructuring, market developments, organisational change, technological developments, skills losses, labour shortages and trade union policies. There are also company-specific, reasons for making age management a key issue, such as cost pressures, consumer demands, flexible production needs, competition for and retention of skilled labour, and changing social values within a company.[8]

Specific age management measures undertaken by companies include awareness-raising of managers and employees, developing age-positive policies, setting up schemes for intergenerational learning, addressing health and safety issues, and a holistic approach to human resource planning in general.

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[8] "Ageing and employment: Identification of good practice to increase job opportunities and maintain older workers in employment" (AEIGP report)

Casey, Metcalfand and Lakey (1993) point out five main dimensions of age management in organisations:

- Job recruitment and exit

- Training, development and promotion

- Flexible working practice

- Ergonomics and job design

- Changing attitudes towards ageing workers[9]

The European Foundation for the Improvement of Living and Working Conditions further describes a series of essential principles of an integrated age management strategy:

- An emphasis on the prevention of age management problems, such as the de-skilling of older workers or work-related health problems, rather than reactive problem solving

- A focus on the whole working life and all age groups, not just older workers

- A holistic approach encompassing all dimensions that contributes to effective age management

- In the short term, remedial provision for older workers who missed out on specific skill training or whose health has suffered as a result of their employment[10]

Labour market policies and frameworks

Finally, age management can be seen as being addressed on various *political* scales, starting from international organisations[11] and ending with local government strategies. An overall framework for age management interlinking the EU and national levels seems essential when considering the complexity of the issue and the challenges of the ageing population in Europe. Such a framework is provided by the renewed Lisbon and European Employment Strategies, which include references and specific priorities for the inclusion and employment of older people. Furthermore, the European Commission Communication "The demographic future of Europe – from challenge to opportunity"[12] talks about *demographic ageing* (i.e. the increase in the proportion of older people) as one of the main challenges that the EU will have to face in years to come. It also invites the establishment of a holistic approach to dealing with the problem of the *ageing population*, which incorporates (amongst others) a better work-life balance, the role and contributions of legally employed immigrants, better services for young parents, more inclusive work environments, as well as longer and more productive careers. In addition, the 2000 Employment Equality Directive[13] established a European legal framework for *anti-discrimination* in the labour market on various grounds, including age.

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[9] Casey, B., Metcalf, H., Lakey, J. (1993) 'Human Resource Strategies and the Third Age: Policies and Practices in the UK' in P. Taylor, et al, Age and Employment, London, IPM.

[10] The European Foundation for the Improvement of Living and Working Conditions. "*Combating Age Barriers in Employment, Portfolio of Good Practice.*" Dublin, 1997.

[11] See for example the UN's Madrid International Plan of Action on Ageing 2002

[12] COM (2006) 571 final. Brussels, 12.10.2006.

[13] 2000/78/EC

1.2.2. EQUAL and the Competence 50+ 2007 Conference

Age management is most directly addressed by the EQUAL DPs funded under the Adaptability pillar. These DPs are working to find remedies to demographic ageing across Europe by improving the situation and preventing the marginalisation of older workers within an enterprise specifically, and their position in the labour market generally. Adaptability DPs also raise questions about how to prevent the exclusion of ageing employees, anticipate changes due to an ageing workforce, and challenge discrimination throughout working life. In this context, they also touch upon the issue of individual motivation - acknowledging that the priorities of the individual change over the course of a working career, providing new career possibilities, additional skills and involvement incentives, as well as changing and updating the attitudes of older workers.[14]

EQUAL DPs – especially those in the Adaptability pillar - are well placed to inform and contribute to the three age management-related themes of the Competence 50+ 2007 conference.

Theme 1: Learning and qualifications

Under this theme the conference can draw on the experience of Adaptability DPs working at the individual level with various 'target groups' of older people, both within and outside the enterprise. This includes measures aimed at improving people's access to learning and qualifications, assessment and valorisation of skills and competences, as well as improving their motivation and career possibilities. The DP activities focusing on improving ICT literacy, preserving or improving employability, facilitating access to lifelong learning and developing new soft skills would be of particular interest under this theme.

Theme 2: Workplaces in change

The experience and good practice of the Adaptability DPs working at the entrepreneurial level with the aim of anticipating change though the development of holistic, inclusive, preventive management and company policies would be of relevance for this theme. The conference participants could examine the practices and approaches employed by the DPs in improving human resource management, facilitating knowledge transfer (or intergenerational learning within a company), and working with employers and line managers to undertake take company-wide age management measures.

Theme 3: Altered conditions and attitudes in the labour market

For this theme, the experience of Adaptability DPs in improving access to employment and the anticipation of demographic trends would be of particular interest. This can include DPs working on a broader, sectoral or territorial level for improving the political, economic and legal frameworks for the better management of age. This can also include facilitating or improving the collaboration between employers, public agencies, social partners at the macro level, creating awareness of the importance of age management issues among these and other actors, reviewing labour market systems and structures, and generally making continuous employment more attractive and 'comfortable' prospect for older workers.

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[14] http://ec.europa.eu/employment_social/equal/news/20030301-adaptability-news_en.cfm

2. EUROPEAN ACTORS, POLICIES AND INITIATIVES: A FAVOURABLE CONTEXT FOR THE NETWORK?

The EU perspective on age management is shaped by a range of policy priorities, targets and guidelines identified in the continuing work on demographic change, e.g. the Commission Communication *The demographic future of Europe – from challenge to opportunity*, as well as by a range of policies on employment, economic and social cohesion, most significantly the *Lisbon Strategy on Growth and Jobs* and the *European Employment Strategy* (EES).

The following sections present an outline of the demographic change facing EU Member States and the way in which implementation of policies prescribed in the above-mentioned and other documents seek to address this evolution.

2.1. DEMOGRAPHIC CHANGE

The challenge of demographic change

Europe, along with other parts of the world, is undergoing a process of demographic change. The population is ageing due to reasons of a decline in the birth rate below the population replacement rate, the ageing of the baby boom generation, and the increase in life expectancy achieved by progress in medicine and the absence of major military conflict in post-war Europe.[15]

The European Commission has sought to identify the challenges posed by demographic change and set in train the development of policies and measures to address these. Their work includes the 2005 Green Paper *"Confronting demographic change: a new solidarity between the generations"*, the consultation that followed the publication of this paper, and the Commission Communication that summed up conclusions from the consultation process. Other initiatives such as the First Forum on Europe's Demographic Future (in October 2006 and to be held every two years) and Directorate General Regional Policy's conference on "Regional Policy Responses to Demographic Challenges" (January 2007) have aimed to facilitate discussion and the sharing of good practice in areas like active ageing and lifelong learning, healthy working conditions, the adaptation of work places and work organisation to the needs of older workers, and incentives for older workers to remain in the labour market. They have also enabled a focus on issues of demographic change as they present themselves in a regional context.

The ageing of the population poses a number of challenges to the European economy. First of all, the **share of the working age population** (15-64 years) is projected to decline by 48 million between now and 2050. Even if the objective of a 70% overall employment rate as set out in the Lisbon Strategy was met, one would still see a decrease in the total number of persons in work by 30 million between 2020-2050. Consequently, the dependency ratio (the number of people aged 65 years and above relative to those aged from 15 to 64) is set to double to 51% by 2050, placing immense pressure on social security systems.[16]

As a result primarily of the reduction in the working age population, **economic growth** is set to decline from the average annual growth rate in GDP of 2.4% in the EU-25 over the period 2004-

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[15] Communication from the Commission 'The Demographic Future of Europe – from Challenge to Opportunity' COM (2006) 571 final, pp.3-4; V. Spidla, opening address to the "First Forum on Europe's Demographic Future", p. 2, 30-31 October 2006.

[16] Communication from the Commission 'The Demographic Future of Europe – from Challenge to Opportunity' COM (2006) 571 final, pp.4-5.

2010 to only 1.2% between 2030 and 2050. Economic growth will therefore increasingly stem from productivity gains, making it essential to promote alternative economic models.[17]

The ageing population presents obvious challenges to **social security systems** and **social services**. Thus for the EU-25, age-related public spending is projected to rise by 3-4 GDP points between 2004 and 2050, representing an increase of 10% in public spending. Unless pension schemes and age related health care and social services undergo (further) reform to curb the spiralling costs, national budgets of individual EU Member States, as well as the functioning of the single currency, are at risk. [18]

Work on the **regional dimension** of the ageing population has stressed the importance of the variation in the impact of ageing between regions, with some regions particularly hard hit by outward migration of working age citizens looking for employment or business opportunities, and other regions having to cope with an influx of retirees resettling due to lifestyle choices. In both cases, particular strains are placed on public service provision and the ability to finance this shift at local level. The change in family patterns whereby today younger generations tend to live further away from their parents only exacerbates the situation by reducing the supply of services through informal networks.[19]

Proposed responses to the demographic challenge

Following the Green Paper on "Confronting demographic change" and the subsequent consultation, a number of responses to the challenges of demographic change were identified in the Commission Communication on the "Demographic future of Europe – from challenge to opportunity". Fundamentally, the Commission defined the challenge as one of retirement rather than age, and as such was to be addressed by the following five core policy directions set out in the Commission Communication:

- Promoting demographic renewal in Europe

- Promoting employment in Europe: more jobs and longer working lives of better quality

- A more productive and dynamic Europe

- Receiving and integrating migrants in Europe

- Sustainable public finances in Europe: guaranteeing adequate social security and equity between the generations.

Of these, the second, third and fifth apply specifically to older age cohorts and age management issues.

While generally building on the 'flexicurity' guidelines (that aim to facilitate the transition between different stages in the life cycle by means of increased labour market flexibility, lifelong learning and active labour market and social security policies), the **promotion of employment in Europe** policy direction focuses specifically on increasing the participation rate of the over 55s. This is to be achieved by means of lifelong learning, flexible retirement schemes, the combating of ageism,

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[17] Communication from the Commission 'The Demographic Future of Europe – from Challenge to Opportunity' COM (2006) 571 final, p. 5.

[18] Communication from the Commission 'The Demographic Future of Europe – from Challenge to Opportunity' COM (2006) 571 final, p. 6.

[19] Communication from the Commission 'The Demographic Future of Europe – from Challenge to Opportunity' COM (2006) 571 final, p. 4.

the creation of employment opportunities for older people, and the promotion of good mental and physical health in old age. The new ESF 2007–2013 provides the main financial instrument for supporting these measures in relation to what is traditionally regarded as the working age population (see Section 2.4). However, the Commission Communication on "The Demographic future of Europe" acknowledges that the means (financial or otherwise) to achieve an increase in participation of the over 65s have yet to be developed.

Promoting a **more productive and dynamic Europe** also draws on the renewed Lisbon Strategy, its general drive towards optimising skills and the quality and productivity of work at all ages, as well as its proposals for older age cohorts specifically. In addition, the Commission Communication points to the need to exploit opportunities offered by demographic change in terms of new markets for goods and services specifically tailored to the needs of an older clientele – what is increasingly referred to as the 'silver economy'.[20]

Ensuring **sustainable public finances** is based on continued reform of pension systems to make them more financially viable, the introduction of supplementary pension schemes and a reduction in early labour market withdrawal based on an increase of the retirement age and provision of financial incentives for workers to stay on in employment.

The progress of Member States against the five policy directions put forward in the Communication on "The Demographic future of Europe", as well as the lessons learnt at the First Forum on Europe's Demographic Future, will be reported in a special chapter of the Annual Progress Report under the Lisbon Process[21], which the Commission will devote every two years to the Union's preparedness for the increase in life expectancy. Whilst the 2006 Annual Progress Report did not look specifically at progress against the five demographic policy directions, it still assessed progress on measures related to these (see Section 2.1.2).

2.2. AGE MANAGEMENT: FUNDAMENTAL TO THE LISBON STRATEGY FOR GROWTH AND JOBS

The renewed Lisbon Strategy (2005) focuses on similar themes, and largely echoes the thinking in the Green Paper and ensuing Commission Communication on "The Demographic Future of Europe". Whilst lamenting the insufficient delivery on the original 2000 Strategy, the Commission states that the renewed Strategy is as crucial as ever, given the widening growth gap between the EU, and North America and Asia. To ensure economic growth and the social and environmental objectives that a dynamic economy can facilitate, failure to keep pace in the areas of productivity, and research and development needs to be addressed, as do the specific challenges posed by an ageing population and work force given their implications for the future growth potential.[22]

As far as age management related issues are concerned, the renewed Lisbon Strategy states that both businesses and the workforce have to become more adaptable to the requirements of a modern, dynamic economy and be given the right conditions in which to do so, i.e. through regulatory arrangements supporting older employees in the labour market, lifelong learning provision to ensure their input remains (increasingly) productive, and social security provision (mainly pension schemes and health care) that makes it financially advantageous as well as physically possible to remain economically active for longer.

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[20] Communication from the Commission 'The Demographic Future of Europe – from Challenge to Opportunity' COM (2006) 571 final, p. 10.

[21] It is presumed that the special chapter will appear in the 2007 Annual Progress Report as the 2006 report has already been published.

[22] Communication to the Spring European Council "Working Together for Growth and Jobs: A New Start for the Lisbon Strategy", COM (2005) 24.

The renewed Lisbon Strategy covers action in three main areas:[23]

- Making Europe a more attractive place to invest and work

- Knowledge and innovation for growth

- Creating more and better jobs

The age management related actions fall primarily within the third action area, although some measures under the first action area - to do with regulatory frameworks under which businesses operate - will help define the legal structure for the employment of older workers. The following policy priorities have been drawn up under the 'Creating more and better jobs' action area:

- Attract more people into employment and modernise social protection systems

- Increase the adaptability of workers and enterprises and the flexibility of labour markets

- Investing more in human capital through better education and skills.

A large range of policy measures and instruments at Community and Member State level were identified in the Lisbon Action Plan that accompanied the renewed Lisbon Strategy, some of which addressed the employment of older workers specifically:[24]

- Develop active ageing strategies (to suppress early labour market exit by offering financial or work related incentives to stay on)

- Reform of pension and health care (to ensure financial viability of systems and offer incentives for longer working lives; to make employment at an older age possible from a health point of view)

- Promote labour mobility by removing obstacles arising from occupational pension schemes

- Adoption of the Lifelong Learning Programme at EU level and introduction of national Lifelong Learning Strategies.

Progress made at Community and Member State level has been assessed in the 2006 Annual Progress Report, and the Member States' National Reform Programs and Implementation Reports.[25] Whilst there is progress to report, with good partnership working at European level ("the European Partnership for Growth and Jobs") feeding through into national reform programmes, and evidence of a shift in policy at Member State level, there is a difference in the pace, intensity and level of commitment amongst Member States towards reform.[26]

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[23] Communication to the Spring European Council "Working Together for Growth and Jobs: A New Start for the Lisbon Strategy", COM (2005) 24, p. 15.

[24] Lisbon Action Plan Incorporating EU Lisbon Programme and Recommendations for Actions to Member States for Inclusion in Their National Lisbon, SEC (2005) 192

[25] Commission Communication Implementing the Renewed Lisbon Strategy for Growth and Jobs: A Year of Delivery, COM(2006) 816 final. For individual Member State reports see following link http://ec.europa.eu/growthandjobs/annual-report-1206_en.htm

[26] Commission Communication Implementing the Renewed Lisbon Strategy for Growth and Jobs: A Year of Delivery, COM(2006) 816 final, p. 7.

In the area of age management policies, few Member States have fully adopted a "lifecycle" approach which, amongst other things, means that unemployment among older workers is still above average, and that more needs to be done to create real job opportunities for this group.

The notion of 'flexicurity' has raised considerable interest, but most Member States are still only implementing some aspects of this concept. Areas in need of further action are, for instance, modernisation of social protection and benefit systems, introduction of lifelong learning strategies, and modernisation of employment protection legislation to combat exclusion of marginal groups in the labour market, including older workers. As a result, the Commission is to produce a Communication on 'flexicurity' by the Summer 2007 that can form the basis for agreement on a set of common principles. However, a general recommendation already at this stage is that Member States should provide targeted incentives to prolong working lives and increase participation in training for workers over the age of 45.[27]

2.3. AGE MANAGEMENT: FUNDAMENTAL TO THE EUROPEAN EMPLOYMENT STRATEGY

The EES is the main vehicle for implementing the employment objectives of the Lisbon Strategy on Growth and Jobs. Since 2003, the EES has been presented in the form of Integrated Guidelines for Member States' employment policies – guidelines that were especially reviewed and revised to facilitate the refocusing of the Lisbon Strategy in 2005.

Overall, the EES is governed by three strategic priorities:

- Strategic priority 1: to attract and retain more people in employment, increase labour supply and modernise social protection systems

- Strategic priority 2: to improve adaptability of workers and enterprises

- Strategic priority 3: to increase investment in human capital through better education and skills[28]

Whilst a number of the guidelines are applicable to all age groups, the following identify how Member States are to achieve the Lisbon objectives relating specifically to age management:

Guideline No 17: **Implement employment policies aimed at achieving full employment, improving quality and productivity at work, and strengthening social and territorial cohesion**. To do so in the case of older workers policies should contribute to achieving an average employment rate for the EU of 50 % (for 55 to 64 year olds) by 2010. To make sure Member States contribute to the wider EU rate, the former should consider setting national employment rate targets.[29]

Guideline No 18: **Promote a lifecycle approach to work** which can facilitate more work over the lifetime of an individual in order to meet the challenges posed by demographic change, the key being an increase in hours worked, longer working lives and later retirement. In the case of older workers, this is to be achieved through support for active ageing, including the introduction of appropriate working conditions, improved (occupational) health status and adequate incentives to work and discouragement of early retirement. It also requires implementation of modern social

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[27] Commission Communication Implementing the Renewed Lisbon Strategy for Growth and Jobs: A Year of Delivery, COM(2006) 816 final, p. 9, 14.

[28] Council Decision of 12 July 2005 on Guidelines for the employment policies of the Member States, (2005/600/EC), p. 1.

[29] Council Decision of 12 July 2005 on Guidelines for the employment policies of the Member States, (2005/600/EC), p. 4.

protection systems, including pensions and healthcare, whose social adequacy, financial sustainability and responsiveness to changing needs will facilitate participation and better retention in employment and longer working lives.[30]

Guideline No 21: **Promote flexibility combined with employment security and reduce labour market segmentation, having due regard to the role of social partners**. 'Flexicurity', whereby the adaptability of workers and enterprises to changing market conditions, technologies and lifestyle requirements is to be strengthened in support of the transition between different stages of working life, is of immense importance to older workers given the implications of more disparate working lives on retirement incomes.[31]

Guideline No 23: **Expand and improve investment in human capital**. In the case of older workers, this entails efficient lifelong learning strategies that provide appropriate incentives and cost-sharing mechanisms for enhancing participation in continuous and workplace training throughout the life-cycle, and especially in older age.[32]

A number of targets and bench marks were spelled out within the framework of the EES, of which the following two are the most relevant for age management:[33]

- Achieving an increase by five years, at EU level, of the effective average exit age from the labour market by 2010 (compared to 59.9 in 2001).

- Ensuring that the EU average level of participation in lifelong learning should be at least 12.5 % of the adult working-age population (the 25 to 64 age group).

Member States' progress on achieving the above is variable. According to the most recent Joint Employment Report, overall, most policy development and implementation has focused on the strategic priority (1) of attracting and retaining more people in employment, with some progress also made on the priority (3) of investment in human capital through better education and skills. However, policy implementation aimed at the remaining priority (2) of improving the adaptability of workers and enterprises is lagging behind.[34]

Progress is being made on the target of raising the **employment rate of older people to 50%** (Guideline No 17), with an above average rise in this to 42.5% across Member States by 2005. However, given that the rate varies significantly between Member States (in no less than nine it is below 35%), and that it still remains 8.5 pp below the 2010 targets, more efforts are needed to accelerate growth. Particular attention needs to be paid to increasing employment amongst older women given the continuous significant gender divide. This is reflected in the need to speed up progress against the specific target of increasing the average exit age by five years by 2010, as this increased by a mere 1.5 years between 2001-2005, reaching 60.9 years, thus requiring an additional 3.5 years increase to be reached in the remainder of the period.[35]

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[30] Council Decision of 12 July 2005 on Guidelines for the employment policies of the Member States, (2005/600/EC), p. 4.

[31] Council Decision of 12 July 2005 on Guidelines for the employment policies of the Member States, (2005/600/EC), p. 5-6.

[32] Council Decision of 12 July 2005 on Guidelines for the employment policies of the Member States, (2005/600/EC), p. 7.

[33] Council Decision of 12 July 2005 on Guidelines for the employment policies of the Member States, (2005/600/EC), p. 7.

[34] Joint Employment Report 2006/2007, 6706/07.

[35] Joint Employment Report 2006/2007, 6706/07, p. 7, 10.

Progress on developing **a life-cycle approach to work** (Guideline No 18) is being made, although there is a need to make the approach more integrated. Reforms implemented include measures to allow older workers to keep working for longer, to facilitate the return of unemployed older people to the labour market, and/or to combat age discrimination. Measures include financial incentives for workers over 65 years of age such as increased exemption limits from income tax and a lowering of social security contributions.[36]

Progress on **promoting flexibility** (Guideline No 21) is disparate and slow. At present most Member States have only implemented stand-alone policy measures under the 'flexicurity' heading rather than the integrated body of measures that is needed to reflect the multifaceted nature of adaptability. The most common measure taken is review of the Labour Code aimed at increasing contractual diversity, flexibility and transition. However, work on developing an integrated concept to cover the interaction of measures that make individuals and enterprises more adaptable needs to be stepped up. Generally, it will require the development of 'flexicurity' pathways that take into account the legislative starting point of individual Member States and combine policies covering labour laws, active labour market measures, lifelong learning and social security reforms. In the course of 2007, the Commission plans to draw up a Communication on the development of common principles of 'flexicurity'.[37]

National Lifelong Learning Strategies were to define measures to **expand and improve investment in human capital** (Guideline No 23) by providing a strategic overview and priority setting, with a targeted allocation of resources that cover all forms of education and training (formal and non-formal) and all levels (from pre-school to adult learning). The Strategies were to foresee flexible learning pathways and effective transition points between levels and systems; and they were to involve stakeholders at all stages of implementation.[38] It appears that at this stage such national strategies are still under development. Progress on achieving the specific target of 12.5% participation rate for adults in lifelong learning is slow. Although participation increased slightly from 9.9% in 2004 to 10.2% in 2005, only five Member States saw participation increase significantly, whilst some Southern European countries and most new Member States had average participation rates of less than half the EU-15 average (5.5%). Of particular concern is the low participation of older workers in lifelong learning in all Member States. Given the challenge of an ageing workforce, measures to promote lifelong learning for people over 45 are urgently needed, with only a few countries having taken concrete steps towards this.[39]

2.4. OTHER POLICIES AND INITIATIVES

European Social Fund (2007 – 2013)

The ESF is a financial instrument for funding work aimed at strengthening economic and social cohesion by improving employment opportunities. It is governed by a General Regulation pertaining to the two Structural Funds and the Cohesion Fund, and by the specific regulation on the ESF itself.

Strategically, the ESF is intended to meet two objectives. Firstly, the **Convergence objective** serves to achieve convergence between Member States by improving conditions for growth and employment through investment in physical and human capital, development of innovation and the knowledge society, adaptability to economic and social changes, protection and improvement of the environment, and administrative efficiency. Secondly, the **Regional competitiveness and**

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[36] Joint Employment Report 2006/2007, 6706/07, p. 9-10.

[37] Joint Employment Report 2006/2007, 6706/07, p. 12-13.

[38] Joint Employment Report 2006/2007, 6706/07, p. 14.

[39] Joint Employment Report 2006/2007, 6706/07, p. 15.

employment objective aims to strengthen regional competitiveness and employment by anticipating economic and social changes through investment in human capital, innovation and the promotion of the knowledge society, entrepreneurship, protection and improvement of the environment, improvement of accessibility, adaptability of workers and businesses, as well as the development of inclusive job markets.[40]

In addition to these general provisions, the specific ESF regulation sets out a number of guidelines and principles underpinning the Fund. Most importantly, the ESF serves to concentrate its support on the implementation of the EES, including the specific target of increasing the employment rate of the over-55s to 50% by 2010, and should focus, in particular, on promoting the adaptability of workers and enterprises, developing human capital and access to employment, reinforcing the social inclusion of disadvantaged people, combating discrimination, and providing incentives for economically inactive persons to enter the labour market. In doing so, the ESF should pay particular attention to lessons learnt through the EQUAL programme on combating discrimination in the labour market, to the need for gender mainstreaming and to the need to counter the challenges posed by demographic change.[41]

Based on the above, the ESF will provide funding under a range of priorities, of which the following are the most directly relevant to age management:

- **Increasing adaptability of workers, enterprises and entrepreneurs** with a view to improving the anticipation and positive management of economic change, in particular by the promotion of lifelong learning and increased investment in human resources by enterprises and workers through the development and implementation of systems and strategies, including apprenticeships, which ensure improved access to training by, in particular, low-skilled and older workers.[42]

- **Enhancing access to employment and the sustainable inclusion in the labour market** of job seekers and inactive people, preventing unemployment, in particular long-term and youth unemployment, encouraging active ageing and longer working lives, and increasing participation in the labour market. For older people specifically, this would entail implementation of flexible measures to keep them in employment for longer.[43]

- **Expanding and improving investment in human capital**, in particular through measures that can raise people's responsiveness to the needs of a knowledge-based society and lifelong learning, and facilitate an increased participation in education and training throughout the life-cycle.[44]

In addition to the priorities mentioned above, a number of other priorities for the ESF involve combating discrimination in the labour market, including that against women, and might therefore also be relevant to age management to the extent that measures taken involve the promotion of the rights of older workers, and especially older female workers given their very low employment

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[40] Council Regulation on the European Regional Development Fund, the European Social Fund and the Cohesion Fund (EC) No 1083/2006, p. 37.

[41] Regulation (EC) No 1081/2006 of The European Parliament and of The Council of 5 July 2006 on the European Social Fund, p. 12-13.

[42] Regulation (EC) No 1081/2006 of The European Parliament and of The Council of 5 July 2006 on the European Social Fund, p. 14.

[43] Regulation (EC) No 1081/2006 of The European Parliament and of The Council of 5 July 2006 on the European Social Fund, p. 14.

[44] Regulation (EC) No 1081/2006 of The European Parliament and of The Council of 5 July 2006 on the European Social Fund, p. 15.

rate. Likewise, the ESF Regulation mentions measures of benefit to older workers although they are of a general nature, e.g. the development of innovative and more productive forms of work organisation, including better health and safety at work, or the modernisation of employment services.

The new ESF provisions came into force in 2007 and will continue until 2013. This means that Member States are currently preparing their Operational Programmes to underpin the ESF measures that will be undertaken at the national and regional levels.

European Social Fund Article 6 Innovative Measures

The ESF Regulation for the previous funding period (2000-2006)[45] contained an Article 6 Innovative Measures initiative which set out specific priorities for the support of innovative, transnational projects in the Member States. The general objective of Article 6 was to support new approaches and identify examples of good practice that could subsequently improve the implementation of the mainstream operations supported by the ESF.

In response to the concerns and priorities of the Lisbon Strategy and the EES, the thematic focus of Article 6 for the period 2004-2006 became the development of "Innovative approaches to the management of change". This contained actions exploring two sub-themes, one of which was the "Management of demographic change", with the aim of supporting innovative actions to promote active ageing and to raise the employment rate of older workers".[46]

Specific priorities for funding under this theme were:[47]

- **Anticipation of ageing and employment trends in a specific context** (e.g. sectoral or geographic) to identify the time and scale of potential bottlenecks and to develop appropriate strategies for retention and/or re-integration of older workers

- **Development of strategies for age management and investment in human resources** to increase the adaptability and flexibility of older workers, as well as of their workplace

- **Development and piloting of alternative working arrangements at enterprise level** to improve the quality of work for older workers and to make the best use of older workers' skills and experience

- **Development and testing of new ways of delivering training to older workers** with the aim of maintaining and further enhancing their skills and qualifications in order to improve their employability

- **Raising the awareness of the potential of older workers** and changing the attitudes and behaviour of both employers and older workers

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[45] Regulation (EC) No 1784/1999 of the European Parliament and of the Council of 12 July 1999 on the ESF.

[46] Applicant's Guide, Innovative measures financed under Article 6 of the European Social Fund Regulation, Budget Heading 04.021000.00.11 "Innovative Approaches to the Management of Change", Call for Proposals VP / 2003 / 21, p. 3.

[47] Applicant's Guide, Innovative measures financed under Article 6 of the European Social Fund Regulation, Budget Heading 04.021000.00.11 "Innovative Approaches to the Management of Change", Call for Proposals VP / 2003 / 21, p. 7-9.

- **Development of alternative strategies to change the practice of using early retirement** as a solution to corporate restructuring by breaking the age bias in reductions of the workforce

A total of 27 projects received support from Article 6 under the "Management of demographic change" sub-theme. A significant number of these projects are still active.

The Mutual Learning Programme – Thematic Review Seminar on Active Ageing

The Mutual leaning Programme (MLP) was set up in 2005 to facilitate mutual learning at all Member State levels and to enhance the transferability of the most effective policies within key areas of the EES. The work of the MLP includes Thematic Review seminars which focus on the following four thematic priorities:

- Increasing adaptability of workers and enterprises.

- Attracting more people to the labour market.

- Investing more and more effectively in human capital.

- Ensuring effective implementation of reforms through better governance.

In April 2005 the MLP hosted a Thematic Review seminar on "Comprehensive Strategies for Active Ageing". The two overall themes for the seminar were: "Incentives to take up work and remain at work longer" and "Developing strategies to increase employability of older workers".

Papers and country examples presented at the seminar focused on the challenges posed by an ageing workforce, including an increase in the old age dependency ratio and age-related public expenditure, especially on pensions, and consequent negative effects on future economic growth and tax levels. They also looked at measures currently taken in a number of Member States to promote active ageing, and found that many were still insufficient in providing the right incentives for employers and employees to participate.

Overall, there was a need for policy on active ageing to be more integrated and strategic, and to join up different government departments in order to cover the various facets of the challenge. Equally, it was concluded that the focus should be moved from being solely on the individual to take into account the way in which ageism has become institutionalised in the labour market and social and economic systems more widely. Consequently, there should be a life-cycle approach to active ageing rather than a purely age-specific one.

A number of more specific policy recommendations were made, including: blocking the road to unofficial early retirement through social security benefits (e.g. disability and unemployment benefits); stimulating investment in human capital (training), in particular targeting individuals (e.g. through initiatives such as individual learning accounts and learning vouchers); making benefit entitlements and levels dependent on previous investment in human capital; 'experience-rating' in social security schemes, under which the contributions paid by employers increase according to the number of older workers they lay off; reducing separation costs in combination with tax bonuses for employers who hire older workers; subsidising wage costs or reducing social contributions/taxes; increasing government support for training and mobility; active labour market policies raising the pension age; making early retirement financially less attractive and making work pay; adjusting pension systems to discourage early retirement.

Lifelong Learning Programme

A new Lifelong Learning Programme (LLLP) came into force in December 2006 under the responsibility of the Directorate General Education and Culture to support the Lisbon Strategy and EES. The objective of the LLLP is "to contribute through lifelong learning to the development of the Community as an advanced knowledge-based society, with sustainable economic development, more and better jobs and greater social cohesion, while ensuring good protection of the environment for future generations".[48] The LLLP encompasses four sectoral programmes, one transversal programme, and the Jean Monnet programme. Of these programmes the following sectoral programmes are relevant to older workers:[49]

- **Erasmus programme** which address teaching and learning needs of those in formal higher education and vocational education and training at tertiary level, whatever the length of their course or qualification may be and including doctoral studies.

- **Leonardo da Vinci programme** which addresses the teaching and learning needs of those in vocational education and training, other than at tertiary level.

- **Grundtvig programme** which addresses the teaching and learning needs of those in all forms of adult education.

A large number of actions are supported under these programmes, of which the support for mobility during lifelong learning is of most direct benefit to older workers.[50]

2.5. EXISTING EUROPEAN NETWORKS

Initial research has revealed a number of European networks focusing on age management and/or ageing issues. These are summarised below, followed by observations as to their main features, differences and similarities. Such observations are useful in determining whether there is a need and scope for establishing the European Age Management Network proposed in this paper. There is little to be gained in re-inventing the wheel!

Please note that the term 'network' has been used quite flexibly in this research to include federations, associations and other types of cooperative organisational structures.

2.5.1. Silver Economy Network of European Regions

The Silver Economy Network of European Regions (SEN@ER) was founded in February 2005, under the initiative of the region of North Rhine-Wesphalia (Germany)[51] in collaboration with ten other European regions. Its main 'raison d'être' has been to capitalise on the economic and social opportunities afforded by an ageing European population, in other words tapping into what is commonly called the 'silver economy'. In terms of specific objectives, the network seeks to foster cooperation between the member regions so as to:

- "Improve the quality of life of the ageing population

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[48] Decision No 1720/2006/EC of the European Parliament and of the Council of 15 November 2006 establishing an action programme in the field of lifelong learning, p. 48.

[49] Decision No 1720/2006/EC of the European Parliament and of the Council of 15 November 2006 establishing an action programme in the field of lifelong learning, p. 50.

[50] Decision No 1720/2006/EC of the European Parliament and of the Council of 15 November 2006 establishing an action programme in the field of lifelong learning, p. 51.

[51] Ministry for Generations, Family, Women and Integration of the State of North Rhine-Westphalia.

- Stimulate activities in [the] case of products and services for greater quality of life in old age with the objective of more growth and jobs

- Consolidate and expand the knowledge base currently available in this connection

- Support the incorporation and cohesion of the European regions"[52]

These objectives span a number of thematic areas, including independent living, tourism, sport, culture, retail, and health and well-being. These have given rise to a number of Specialist Interest Groups within the network on the subjects of Ageing Well, Culture and Ageing, Financial Services and Tourism.

Since its launch, the network has expanded to a membership of 16 regions, covering parts of Austria, Bulgaria, France, Germany, Ireland, the Netherlands, Poland, Spain and the UK. These regions are represented on the network by the relevant public authorities, although there is a clear desire to cooperate more widely with social partners, NGOs and other stakeholders in the silver economy.

The main activities of the network appear to be centred on awareness-raising, exchange of information and know-how, and mutual support in the development of ageing-related initiatives across the regions, all of which are underpinned by a dedicated Management Group and communicated via SEN@ER website. A highlight in the network's diary is an annual conference, which brings together institutions and companies to discuss new products, services and opportunities linked to the above-mentioned topic areas. The next conference is due to take place in Seville, Spain on 15 and 16 November 2007.

http://www.silvereconomy-europe.org

2.5.2. European Older People's Platform

Established in 2001. the European Older Workers People's Platform (AGE) is a gathering of European, national and regional (non-profit-making) organisations, all of whom are comprised of older people or working for older people. The main aim of the Platform is to raise awareness, promote and campaign for the interests of older people in relation to EU policy making, as set out below:

"AGE is involved in a range of policy and information activities to put older people's issues on the EU agenda and to support networking among older people's groups. Among our guiding principles is that a change of attitudes is needed to achieve a society for all ages, seeking solidarity between generations in a way that recognises older people's contributions to society. AGE is committed to combating all forms of age discrimination in all areas of life and aims to monitor and influence the implementation of the various EU initiatives in this area."[53]

AGE's work is divided into a number of thematic areas, namely: social policy, discrimination, pensions, social exclusion and poverty, employment, health, independent living and accessibility, and lifelong learning and citizenship.

The membership of AGE is large and wide-ranging. It currently comprises organisations in 20 EU Member States, nine with a European remit, as well as three outside the EU. Via several management and executive structures (including a Brussels-based Secretariat), these organisations work together to campaign in a number of ways. The most prominent of these are consulting with members and preparing AGE position statements, providing the latest news and

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[52] Bonn Declaration for the Silver Economy, 17 February 2005.

[53] http://www.age-platform.org/EN/rubrique.php3?id_rubrique=20

information on European (and national) policy developments, participating in fora and events, and contributing to European research and grass-roots projects.

On the budgetary side, AGE is part financed by the European Commission and its organisational members.

http://www.age-platform.org/

2.5.3. International Federation on Ageing

The International Federation on Ageing (IFA) is a network of organisations, institutions and individuals seeking to "give a voice to older people globally."[54] Its remit centres on promotional, information and educational activities in relation to the improvement of the quality of life of older people. Interestingly, this remit includes strengthening partnerships and collaboration between the different types of organisation spanning the public, private and non-governmental sectors.

The thematic areas underpinning the IFA's work until 2008 have been defined as poverty, health and wellbeing, abuse and neglect, discrimination and ageing, and gender issues.

Aside from providing international news and information (via their website), the IFA produces a number of regular publications, including a newsletter to exchange views and practice etc. called 'Intercom: Ageing in Focus', and 'Global Ageing: Issues and Action' which provides more in-depth analyses to inform policy and debate. These two publications as supplemented by ad-hoc specialist reports, as well as an annual global conference.

Although the IFA's membership extends to 62 countries, only approximately half of the EU Member States are represented (mainly from the EU-15).

http://www.ifa-fiv.org/en/accueil.aspx

2.5.4. European Federation of Older Persons

Established in 1962, the European Federation of Older Persons (EURAG) shares many similarities with the previous two networks. It is a non-profit making organisation that aims to promote the quality of life of older people in social and political terms by bringing together public and private sector bodies, as well as individuals, who are active in this field.

EURAG's member organisations are situated in 32 European countries, extending beyond the EU to include Albania, Iceland, Israel, Russia and Switzerland. It has a seat in Luxemboug and the General Secretariat is based in Graz, Austria.

In terms of activities, EURAG focuses on organising international events to exchange information and contributes to on-the-ground projects. On the political scene, it has a number of working groups and committees that discuss and prepare proposals/statements aimed at influencing European and international audiences, such as the European Parliament, United Nations Organisation and World Health Organisation. This is facilitated by 'participatory status' on the Council of Europe and 'consultative status' with the United Nations.

Aside from giving introductory information, EURAG's website is far less populated than those of the previous networks. It appears to be used less as a portal for the exchange and dissemination of information relating to ageing issues. The thematic foci of the above working groups and committees, and other activities, are not expressly clear from the website.

http://www.eurag-europe.org/

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[54] http://www.ifa-fiv.org/en/accueil.aspx

2.5.5. International Federation for Associations for Elderly People

The International Federation for Associations for Elderly People (FIAPA) was established in 1980 by four national associations for older people (from Belgium, France, Italy and Spain). Since that time, it has expanded to include 150 associations for elderly people, covering 37 countries and five continents.

FIAPA presents itself as a leading authority and centre of expertise on ageing issues, and the needs and interests of older people. As such, it organises scientific seminars and workshops, conducts surveys, and publishes booklets on research/activities to enrich and transfer of knowledge. Moreover, it has its own team of experts – known as the Scientific Council – which the previously-mentioned networks do not appear to have. Beyond its expert role, FIAPA also carries out various missions to provide advice and humanitarian assistance in cooperation with its national member organisations.

FIAPA enjoys participative/consultative status with a number of international organisations, most notably with the Council of Europe. More recently, "in order to have a greatest presence at a European level and to provide the European Commission with a unique representative for questions relative to elderly people, FIAPA with two other international organisations has created EUROLINKAGE and…the European platform for elderly people (AGE). FIAPA has occupied the presidency of this new European organisation during its first year"[55]

FIAPA comprises a number of decentralised areas, including one for Europe. FIAPA Europe was established in 2002, and as with the other areas, is responsible for disseminating FIAPA information, co-ordinating action and providing translation services as needed. FIAPA Europe has set up national associations in Belgium, France Italy and Spain.

http://www.agetimes.com/senior_citizens_federation/poles_relais_eng.php

2.5.6. Eurolink Age

Eurolink Age is often mentioned as another established European network; as mentioned above, it is one of the structures recently set up by FIAPA. However, there does not appear to be a dedicated European website for this network. In fact, the web link for Eurolink Age leads directly to the website for Age Concern for England, which in turn has a European and International Unit.

http://www.eurolinkage.org/AgeConcern/default.asp

2.5.7. Other relevant networks

The above-mentioned networks appear to the main ones operating on the European scene. However, it is worth mentioning others networks that have come to light and could be researched at a later date.

A quick review suggests that some of these networks are specialised (for example in having a social dialogue focus or religious/political/target group bias), whilst others address ageing issues as part of a wider thematic remit. Some of the networks also appear to be smaller in terms of geographical scope, capacity and/or membership.

- European Foundation for Retirees and Older People - http://ferpa.etuc.org/

- Older Women's Network – Europe – Alvy Derks, derkstai@planet.nl

- European Centre for Workers' Questions - http://www.eza.org/

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[55] http://www.agetimes.com/senior_citizens_federation/citoyens_la_vie_durant_eng.php

- European Anti-Poverty Network - www.eapn.org

- European Senior Citizen's Union - http://www.eu-seniorunion.info/

Finally, an interesting project called "ERA-AGE" has come to light. This project is "is a four year project funded by the European Commission, under the Sixth Framework Programme. The aim of ERA-AGE is to promote the development of a European strategy for research on ageing and, thereby, to enable Europe to gain maximum added value from investment in this field."[56] The project has developed a useful resource, namely a large database containing information about European research on ageing covering research funding agencies, research programmes, and research centres and institutes. http://era-age.group.shef.ac.uk/

2.5.8. Observations from the networks

Looking across the main networks, it is possible to make a number of observations.

- **Thematic focus** – all of the networks have the overall aim of improving the quality of life of older people. This aim covers a range of (inter-related) policy fields, extending beyond employment and labour market issues and touching other areas such as housing, health and well-being, and citizenship. The one exception to this is SEN@ER, which also has a commercial and economic remit in terms of maximising the market potential of the 'silver economy'.

- **Activities** – there appear to be six main activities of the networks:

  o Sharing information, experience and knowledge

  o Developing knowledge and expertise

  o Promoting cooperation between the network members, and between the network members and other actors and stakeholders

  o Dissemination and awareness-raising

  o Policy-influencing and lobbying

  o Advisory and humanitarian assistance

  All of the networks undertake these activities, except for the last, in varying degrees. There are three networks that appear to place greater emphasis on influencing policy and lobbying on behalf of older people or organisations that represent this target group. These are AGE, EURAG and FIAPA. Very importantly, these organisations are recognised at the European level. AGE in particular is financed by the EU, and both EURAG and FIAPA have 'consultative roles vis-à-vis the Council of Europe and/or European Commission.

- **Membership** – for most of the networks, membership is limited to non-governmental organisations (NGOs) comprised of or representing the interests of older people. SEN@ER is again the exception insofar as their members are regional public authorities. For some networks (such as IFA) there are references to the importance of engaging and collaborating with employers, public authorities, social partners etc. This comes through, for example, in the networks' organisation of dissemination events, specialist/expert groups and funded projects. However, these players are generally outside of the official network membership.

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[56] http://era-age.group.shef.ac.uk/

The geographical scope of the networks is varied, ranging from international membership (with relatively small European representation) to European membership. None of the networks focus specifically or exclusively on the EU Member States. That said, of the European networks, AGE and EURAG have the highest levels of EU country representation, including the new EU-12.

- **Management and resources** – all of the networks have formalised management and organisational structures, not only to oversee their work programmes, but also to allow for the democratic and transparent engagement of their membership. These include General Assemblies, Secretariats and specific working/expert groups.

  The networks are generally resourced via a combination of membership fees with ongoing public funding, in some cases from the European Commission. There are also instances of ad-hoc or regular financial contributions, particularly in the organisations of large-scale conferences or discrete, specific projects.

3. EQUAL: A POTENTIAL SOURCE FOR THE NETWORK?

Section 3 presents in detail how and the extent to which age management is addressed by EQUAL. It starts by giving an overview of the 'age management DPs' in the programme generally, as well as the Adaptability pillar specifically. It then goes on to present the main characteristics and outcomes of the DPs, as well as the various European activities during the first round (2002-2004/5). This is followed by a presentation of the results of a new piece of research examining the characteristics and priorities of age management DPs in the second round (2004/5-2008). Finally, there is a summary of the national thematic activities in relation to age management, across both rounds.

3.1. OVERVIEW OF THE 'AGE MANAGEMENT DEVELOPMENT PARTNERSHIPS'

It is hard to give a 'watertight' overview of the extent to which EQUAL DPs are addressing age management without undertaking detailed case studies of all the 3,616 DPs. However, one may get a relatively good overview of the DP activities and thus the scope of the age management DPs within EQUAL by undertaking a keyword search in the EQUAL Common Database database (ECDB).[57] [58] The results of this analysis are presented below in Table 3.1.

According to the ECDB descriptions, around 210 out of 3,616 DPs (or around 6% of all EQUAL partnerships) were/are working with issues related to age management across both EQUAL rounds.[59] The percentage of the EQUAL partnerships dealing with age management has grown from 4% in the first round to 7% in the second. The actual number of DPs dealing with this theme has doubled in the second round (from 66 to 144).

Table 3.1 – Number of age management DPs across the two EQUAL rounds

	Total	Round 1	Round 2
Number of all EQUAL DPs	3,616	1,526	2,090
Number of all age management DPs	210	66	144
Percentage of age management DPs	6%	4%	7%

Diagram 3.2 below presents the spread of the age management DPs across the nine EQUAL thematic fields:

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[57] The key-words used to identify DPs working with the Age Management related issues were: "older workers, active ageing, age management, ageing population, demographic change, demographic ageing, active ageing, management of all ages, diversity management, age discrimination, senior workers, senior employees"

[58] It has to be noted that ECDB presents the DPs' plans and intentions at the outset of funding, rather than their actual progress and activities.

[59] Some ECDB descriptions use age management related keywords, but the DPs do not actually relate to age management. This issue was taken into account in the calculation of the number of age management DPs by allowing for a margin of error. Therefore the numbers of age management DPs calculated across the programme and for the various thematic fields (except for the Adaptability thematic fields in the second round) are estimates.

Diagram 3.2 – Number of age management DPs across the nine thematic fields
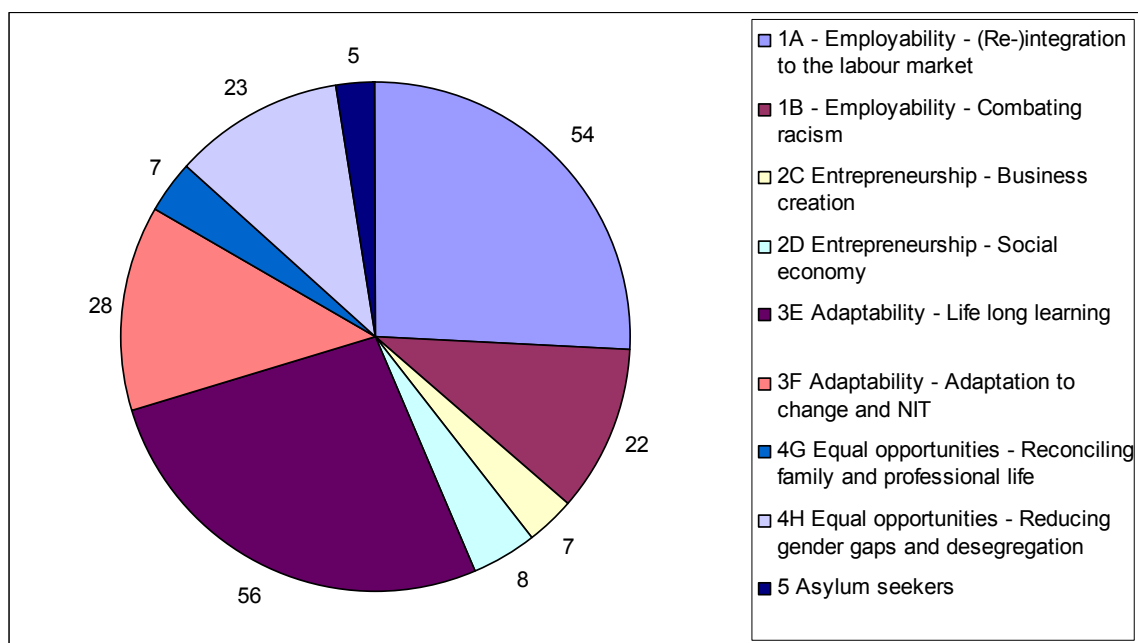
It is useful to interpret the above figures in relation to the overall number of DPs in each of the thematic fields, as presented in Table 3.3 below.

Table 3.3 – Proportion of age management DPs across the nine thematic fields

Thematic fields	No. of age management DPs	No. of DPs in the thematic field	Percentage of age management DPs
1A - Employability - (Re-)integration to the labour market	54	1,186	5%
1B - Employability – Combating racism	22	194	11%
2C Entrepreneurship - Business creation	7	299	2%
2D Entrepreneurship - Social economy	8	435	2%
3E Adaptability - Life long learning	56	531	11%
3F Adaptability - Adaptation to change and NIT	28	335	8%
4G Equal opportunities – Reconciling family and professional life	7	214	3%
4H Equal opportunities - Reducing gender gaps and desegregation	23	312	7%
5 Asylum seekers	5	110	5%

As indicated in the table above, Themes 1B - *Employability - Combating racism* and 3E *Adaptability - Life long learning* have the highest saturation of DPs working with age management issues – 11%. The percentage is equally high (8%) in the other Adaptability theme - Adaptation to change and New Information Technology (NIT). Surprisingly, considering the thematic relevance of 1A - *Employability - (Re) integration to the labour market*, only 5% of the

DPs under this large EQUAL theme appear to deal with age management. That said, the number of DPs in thematic field 1A is still high, standing at 54.

To conclude the general analysis, Table 3.4 below presents the country spread of the age management DPs.

Table 3.4 – Number of age management DPs across the Member States

Member State	No. of DPs	Member State	No. of DPs
		Italy	25
Austria	8	Latvia	0
Belgium Fr	0	Lithuania	3
Belgium NL	3	Luxembourg	0
Cyprus	0	Malta	0
Czech Republic	5	the Netherlands	3
Denmark	8	Poland	6
Estonia	0	Portugal	3
Finland	5	Slovakia	5
France	20	Slovenia	1
Germany	54	Spain	3
Greece	3	Sweden	6
Hungary	1	UK Great Britain	39
Ireland	7	UK Northern Ireland	1

This table illustrates that the highest number of partnerships related to age management operate in Germany, the United Kingdom, Italy and France. The rest of the countries follow after a considerable gap in the number of partnerships. This could be partially explained by the size of the Member States and the degree to which the Member States have emphasised age management and ageing issues in their EQUAL Operational Programme. However, several large countries (Spain and Poland) have relatively few DPs working with the sub-theme. In terms of the new Member States, Poland, Estonia and Slovakia are the highest represented with 6, 5 and 5 DPs respectively.

The DPs funded under the Adaptability pillar (thematic fields 3E and 3F) are the primary focus for this document and therefore merit further analysis. Overall, there are 866 Adaptability DPs, representing 24% of all EQUAL partnerships. 84 partnerships (or around 10% of all Adaptability partnerships) are/were dealing with the issues of age management. Of these, 55 are presently active, developing their deliverables and products under the second round.

Table 3.5 below offers an overview of the presence of the age management DPs in the Adaptability pillar.

Table 3.5 – Number of age management DPs in the Adaptability pillar

	Total	Round 1	Round 2
All DPs in the Adaptability pillar	*866*	*363*	*503*
Number of age management DPs in the Adaptability pillar	84	29	55
Percentage of age management DPs	10%	8%	11%

The Adaptability pillar subdivides into two thematic fields *3E - Lifelong learning* and *3F - Adaptation to change and NIT*. With 56 DPs, the *Life long learning* thematic field has the biggest total number of DPs working with the age management issues (followed by 54 DPs for theme *1A Employability - (Re-) integration to the labour market*). In terms of the rounds, the first round saw 21 DPs and 8 DPs working on age mangement issues in the thematic fields 3E and 3F respectively. For the second round, there are 35 DPs presently active for thematic field 3E and 20 for thematic field 3F. The activities, outcomes and messages of all of these age management DPs are explored in greater detail in the subsequent sections. Moreover, the saturation of DPs dealing with the age management-related subjects is generally higher in the second round and in the Lifelong learning thematic field.

Table 3.6 below offers an overview of the presence of the age management DPs in the Adaptability pillar.

Table 3.6 – Number of age management DPs in the Adaptability thematic fields

	Total	Round 1	Round 2
All DPs in the Lifelong learning thematic field	*531*	*233*	*298*
Number of age management DPs in the Lifelong learning thematic field	55	20	35
Percentage of age management DPs in the Lifelong Learning thematic field	11%	9%	12%
All DPs in the Adaptation to Change and NIT thematic field	*335*	*130*	*205*
Number of age management DPs in the Adaptation to Change and NIT thematic field	29	9	20
Percentage of age management DPs in the Adaptation to Change and NIT thematic field	8%	6%	10%

3.2. OUTCOMES AND MESSAGES FROM THE FIRST ROUND

This section presents the main outcomes and messages from the age management DPs during the first round of the Adaptability pillar. It can be seen that the DPs were particularly active, not only via individual partnership activities, but also through European collaboration in the form of working groups, large-scale events and key publications.

3.2.1. Overview of the first round Development Partnerships

The main age management areas addressed by the EQUAL DPs were:

A lifecycle approach to working life

- Changing employers' attitudes to age

- A working life cycle perspective for human resources

- Keeping workers healthy and safe

- Mobilising all stakeholders

Crossing the generations

- Promoting links between generations

- Developing and applying innovative intergenerational tools

Some key messages, examples and engaging quotes in relation to each of these sub-themes is presented below.[60]

A lifecycle approach to working life

> **Overall key message:** Tackling the existing paradoxical attitudes towards age: making employers aware that older workers are able to adapt to changes in the work organisation and are an important asset in terms of experience. At the same time resources should be invested in quality at work throughout the whole lifecycle of all employees.

Changing employers' attitudes to age

> **Key message:** Employers are unaware of the myths and clichés they harbour in their own attitudes towards their ageing workforce. Using methods like studies, diagnostics, press conferences, films, Internet portals, and training can reverse this trend. 'Diversity tool kits', designed to persuade employers to look at skills rather than at age or sex, seem to be a great success.

DPs like Over 45 (Italy), Netab (Germany), Senior (France), Moderniser avec les seniors (France), The Power of the Experienced (Finland), Paradox (Belgium), TRED (Ireland) provide some concrete examples of this message.

The Irish DP TRED - Training Response to Equality and Diversity, whose lead organisation was Trainers Network, aimed to develop training responses to address equality, diversity and multicultural issues. TRED was tackling discrimination in the Irish labour market by devising training for organisations to support inclusive work practices and diversity management. The training was aimed at individuals with responsibility for human resources within the organisations and enabled them to respond positively to equality and diversity issues. This again promoted innovation and maintained job security and organisational survival. An employee involved in the DP stated that:

"The Equality and Diversity Training has been complementary to my training in 'Organisational and Workplace Mediation'. It has provided me with valuable and additional information and knowledge on appropriate policies and procedures for the managing of diversity. It has allowed me to learn the elements of 'good practice' that would influence the facilitation and development of a mediated agreement between parties in dispute"

A working life cycle perspective for human resources

> **Key message:** Human resources strategies need to take on board a preventative approach with regard to ageing. Innovative ways of implementing that strategy in the light of 'active ageing' include creating new functions within the company, personalised training, the 'second career stage' (through skills assessments, validation of professional experience, groups discussion, etc.), In order to support small and medium-sized companies (SMEs) to work on a new human resource strategy, networks of business were created locally or regionally.

This message is supported by the following DPs : Acento (Spain), Offensive fur Altere (Germany), Développement et valorisation des métiers de la maîtrise du bien vieillir, Handi visa vers l'emploi, Moderniser avec les seniors (France), Didactt (France), Eden (UK), CVO (Netherlands), Synergies –Creation (Belgium).

The shipyard industry in Finland, as in the wider EU, has been declining over recent years, which has led to high unemployment levels and redundancies. The Finnish Ammattilaisen Vayla (FI-22)

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[60] The key messages and quotes derive from written communication with the DPs concerned.

DP, led by Turun Aikuiskoulutussäätiö, experimented with ways of maintaining the current level of employment in the shipyards and upgrading the professional and vocational qualifications of the workforce. According to a worker benefiting from the work of the DP:

"I am now doing further training to develop my skills and hope to get another post within this company once I complete my complementary training courses"

Keeping workers healthy and safe

Key message: A healthy and safe working environment is important to avoid accidents and to keep staff motivated. This well-being avoids costly absenteeism and allows employees to stay working and contributing to the work development longer. Current Human Resource Management do not take this into account adequately. Health and safety can be improved by involving workers themselves, health professionals and other in creating safe working procedures. This can be done sectorally and transnationally. The results can be put into health and safety guidelines and be basis for awareness raising.

The following DPs are highly relevant to this sub-theme: The Power of the Experienced (Finland), the Route of a Professional Shipyard Worker (Finland), The four-way model, 4T' (Finland), Atout'age, Didactt, Mérite – Tertia Tech 3000 and Moderniser avec les seniors (France), Nerion II (Greece) and Advise (Spain).

The Greek DP Neorion II, led by Neorion New SA of Syros Shipyards, is developing innovative and flexible tools such as job profiles, work post specifications, training manuals, VR training software, e-learning platform and skill assessment tools, as well as the systems to support human potential and enhance adaptability and employment in the Greek shipbuilding industry. A worker involved with the DP stated that:

"A picture says more than a 1.000 words." It was impossible to use words to describe the working positions we used in the harbour when loading and unloading etc. Then somebody came up with the idea of using a digital camera. We sent the pictures round to our partners in other countries and then we made a book with the recommended positions and everything in them. It is good to know that my broken back has come to good use in some way. This project will probably save a back or two"

Mobilising all stakeholders

Key message: Companies, social partners, local authorities, training bodies and public employment services all need to work closely together in achieving active ageing. EQUAL shows that the best solutions found are based on intensive discussions held by a wide variety of relevant stakeholders this can take the form of dialogue with regional partners, involvement of for example occupational physicians and researchers, personalised support of individual workers etc.

Example DPs for involving all stakeholders include Worklife Adaptability Partnership (UK), Atout'Age (France), The Extended Tutor Function (Denmark), NERION II (Greece) and Zurekin Sarean (Spain).

The Spanish DP, Zurekin Sarean – Contingo en la red, whose lead partner is Gobierno del País Vasco - Dpto. de Justicia, Empleo y Seguridad Social. D. Empl, aimed to support and promote employment and competitiveness of a wide range of beneficiaries. These included micro-companies and self-employed people, SMEs, social enterprises, and companies managed by women and less favoured groups. The DP was promoting and implementing innovative intervention formulas to foster the adaptation of the aforementioned organisations to new technologies. The DP coordinator stated that:

"We wanted our training to fit the needs in the region and adapt it to possible technical developments in the future. By engaging a wider spectre of stakeholders in our partnership we

ensured that we got all the relevant expertise involved in creating, testing and modifying our product. Involving the national employment agency in our project also meant that when our model was successful this agency spread the message to all the local employment agencies too"

Crossing the generations

> **Overall key message:** It is important to focus on intergenerational learning to acknowledge, value, transfer and exchange skills and know-how. It is also crucial to achieve this interchange by using two-way mentoring and self-assessment tools where younger and older workers learn from each other.

Promoting links between generations

> **Key message:** Several DPs have highlighted the importance of changing the perception of older workers and raising employers' awareness of the benefits of intergenerational transfer.

Examples of these DPs include: Paradox (Belgium), Equality (France), The Route of Professional Shipyard Workers (Finland), School@Work (Sweden), The Extended Tutor Function (Denmark) and TRED (Ireland).

The Danish DP, The extended Tutor Function (DK 18), which is led by Jobrotation i Århus Amt, had a double purpose in that its activities aimed at both unemployed and employed people who were marginalised or at risk of becoming marginalised. It addressed the need to retain old staff and attract and retain new staff by creating an "extended tutor function". The method involved creating a climate of responsibility for new comers and the planning of introduction activities in the company, setting company goals for the tutor function, training tutors and implementing and developing the tutor relationship with new employees. An older worker involved in the DP stated that:

"I knew I had a lot to teach this youngster they assigned to me. But I didn't count on learning from him. All those IT skills were very useful to learn and we developed into a real team using each other's strong points and developing our weaker points. I also enjoyed teaching him as I feel that my knowledge will not go to waste when my time for retirement comes. But I will carry on for a few more years yet to complete this knowledge transfer project. It's now become standard practice in our company"

The French DP, EQUALITY (FR-NAT-2001-11006), led by Enterprise et Personnel, focussed on preventing the risk of professional exclusion by assessing employee competences and experiences, promoting transfer policies for this within companies, as well as developing the intergenerational links between existing and new employees to ensure that skills are kept in the company. According to one older worker involved with the DP:

"It is nice to leave a company when knowing that all we learned is not lost, that we give this knowledge to someone."

Developing and applying innovative intergenerational tools

> **Key message:** The choice of tools to be used for intergenerational learning very much depend on the particular sector, company size, the context and culture as well as the national legal framework.

With this key message in mind, the most important tools developed by the EQUAL DPs were:

- In-depth self-assessment that captures the knowledge of a worker's awareness of his or her skills and which has an empowering effect
- Coaching of older workers to help them express their ideas and views of a particular problem to their employer

- A learning forum for discussion between newcomers and more experienced workers, which enables exchange and transfer of knowledge aimed at evaluating solutions to training and work organisation issues
- Tutoring and mentoring models that support the flow of knowledge between older and younger generations
- Rethinking information and communication channels to increase the flow and the quality of exchanges between workers and generations of workers (e.g. a multimedia working group was set up to enable older workers to identify key competences of a job as well as potential training that would enable them to adapt to new technologies or to develop a new career)

The following DPs developed models and methods along the lines of the examples above: Moderniser avec les Seniors (France), The Extended Tutor Function (Denmark), Ages et Travail dans le Batiment Travaux Public (France) and NETAP (Portugal).

One older worker involved in the Danish DP, The extended Tutor Function (DK 18), which was described in connection with 'Promoting links between generations' stated that:

"I am old compared to my colleagues, but since I assessed my knowledge, I am able to transfer my competences. They really appreciate what I can teach to them and guide them. During the discussion, I am also still learning. It is great to have new challenges at my age!".

3.2.2. EQUAL@Work: age management working group

During the first round and within the framework of the Adaptability pillar of EQUAL, an age management working group was set up by the EQUAL Unit of DG Employment, Social Affairs and Equal Opportunities in collaboration with the French EQUAL Managing Authority. The purpose of the working group was provide a crossroads between the practice of DPs on the ground and the wider framework of European policies, and thereby reinforce and disseminate the policy-relevant messages of the DPs in relation to age management.

The specific focus of the working group was in identifying good practice that combines the adaptation of the individuals, especially older workers (in work or out of work) with the adaptation of enterprises. The group took a multi-dimensional approach to age management in the work place, as it saw the problem of discrimination against older workers as multi-dimensional and requiring a multi-faceted solution which takes into account issues like changing skills needs, traditional attitudes to training for older workers and the expectations of both employers and employees. This reflected the multi-dimensional work of DPs of whom many work on a combination of approaches relating to perceptions of age amongst employers and employees, workforce motivation, new working practices, and how age links with other variables (e.g. gender and the barriers facing older female workers specifically).

In practical terms, the working group focused on making the workplace more attractive to older workers as well as making older workers more attractive to employers with a view to developing a professional pact amongst stakeholders that can facilitate an increase the employment of older workers. The role of social partners within DPs was crucial in taking this kind of work forward.

The main achievements of the working group were:

- A brochure "EQUAL@Work Helping Employers and Employees Adapt to Change"

- A series of working group meetings with selected DP to discuss specific issues

- Regular updates from the working group, mailed round to groups of DPs, social partners, companies and managing authorities

- Written DP 'success stories' (or case-studies)

- Policy briefs gathering the information collected during Round 1 with practical examples. Many of these addressed age management issues, particularly the following briefs:

  o "Crossing the generations - EQUAL supports intergenerational learning to balance the workplace"

  o "Making the most of Human Resources - EQUAL encourages SME employers to invest in human capital"

  o "The Working Life Cycle - EQUAL develops new ways of tackling age management"

The results of the working group were showcased at the conference "Free Movement of Good Ideas" in Warsaw on 25 and 26 February 2005. The Conference was organised by the European Commission and co-hosted by the Polish Government. Of particular note was the workshop focused on "Age management throughout working life" and, more specifically, strategies to encourage employers to recruit and retain older persons. Two principal issues were discussed in this respect:[61]

- Issue 1: Age as an aspect of diversity management and the shift from a focus on age to skills and competences.

  o The benefits of such a shift are a reduction in skills mismatches and long term vacancies that are currently caused by the unwillingness of some employers to contemplate the employment of older workers.

  o However, in promoting this shift it is necessary to take into account the cultural, environmental and national context in which companies operate, as well as the size of companies themselves, as all of this impacts on recruitment practices.

- Issue 2: Capturing tacit knowledge of older workers and using them as mentors for younger generations to enhance knowledge transfer from one generation to another.

  o Inter-generational knowledge transfer is seen to be particularly useful for SMEs who often do not have the resources to undertake more formal kinds of training and professional development.

  o It was also seen as a way of passing on tacit knowledge about topics like health and safety that might not otherwise get picked up in courses or general literature.

  o It was agreed that trade unions should be involved in facilitating knowledge transfer practices.

Another workshop focussed on "how SMEs can be encouraged to invest in the training of their staff and methods and tools for training that meet the needs of SMEs". This workshop addressed two specific issues:[62]

- Issue 1: How to convince SMEs to invest in staff training and how to support them through networking and cooperation

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[61] For more information see the following website "Age management throughout working life"

[62] For more information on this see the following website "how SMEs can be encouraged to invest in the training of their staff and methods and tools for training that meet the needs of SMEs".

- o Include relevant stakeholders as partners in the project in order to convince the enterprises about the importance of the issue

- o Be a mind opener for the companies. The starting point should not be to provide a solution, i.e. training programmes, but to raise the awareness of problems which will be caused by ageing staff who do not undergo training

- o Make a profile of the age structure in the company and launch a discussion on the current situation and the situation in a number of years

- o Provide tailor-made short- and long-term approaches to prevent demographic change from becoming a problem in the companies. The companies are thereafter willing to invest in staff training

- Issue 2: Approaches and tools for skills assessment and training that are adapted to SMEs

  - o There is no "one-size-fits-all" model for skills assessment and training, but there are common structures which can be adapted to the specific needs and type of SMEs

  - o Embedded training should be considered a strategic management approach. Some non-traditional approaches have proved to be very successful

  - o There is a clear need to convince SMEs that it is in their interest to training workers as it leads to increased productivity. Special attention should be placed on training older workers

The 'Agora' was the last official meeting of the EQUAL@Work working group (see Section 3.2.3).

3.2.3. The Agora "Experience is capital"

The 'Agora' was a European EQUAL event jointly organised by the French Ministry for Employment, Social Cohesion and Housing, and the European Commission. It was supported by a steering group of representatives from Belgium, Finland, Germany, Greece, Ireland, Poland, Portugal and Spain.

Held on 23 and 24 June 2005 in Paris, the Agora brought together more than 40 EQUAL DPs, 200 speakers, and overall 570 participants from throughout Europe. Together, the participants debated and explored solutions to the problems of low employment participation rates of the over 50s. Thanks to this debate, policy makers, businesses, social partners and representatives of institutions and territories were able to learn from the wealth of innovative and practical experience from EQUAL and to explore the possibilities for transferring solutions between countries to address common problems.

The Agora was structured around four sub-themes:

- Age management, including older workers

- Towards the management of all ages

- Promoting diversity

- Together in Europe

The main messages emerging from the discussion under each of these themes are listed below.

Theme 1: Including older workers - avoiding the exclusion of seniors from the labour market

Given the challenges posed by an ageing (working) population, promoting active ageing and policies to foster the employability of over 50-year olds are high priorities. To prevent the current exclusion of older workers and promote active ageing, the following steps should be taken:

- Identify the trends/realities of age and work in order to develop adapted and tailor-made strategies to increase the employment rate amongst the over 50s. EQUAL partners are working successfully with companies in different parts of Europe to achieve this.
- Diagnose the impact of ageing in order to steer action. This involves taking into account constraints and opportunities posed by the environment and local labour markets and identification of mechanisms to promote mobility within companies.
- Acknowledge that ageing should be the objective of age management strategies. This involves: drawing up measures to address the needs of both employees and employers; promoting better working conditions; and introducing flexible forms of employment and career management strategies. This requires an anticipatory approach to skills' and responsibilities' management within companies and a focus on the acquisition, development and transmission of competences.

An example of a DP working along these lines is link Part'@ge (in France) whose bespoke training activities for senior workers provided a new impetus to the somewhat traditional and conservative agricultural sector. The impact created by Part'@ge was very positive as activities took into account the specific working and social context of the sector. The focus was on promoting the productivity of agricultural companies by helping them address issues of modernisation and the accompanying workforce adaptation in a way that made the best use of companies' and workers' own resources.

Theme 2: Towards Management of All Ages

There are growing concerns about the loss of knowledge and experience when long standing employees leave the workforce, and as a result an increased focus has been put on how to promote the retention and exchange of tacit knowledge amongst employees. Key messages on this issue were the need to:

- Recognise and identify the skills and experience that experienced employees have and organisations need to retain and transfer to future generations of employees.
- Explore and test methods to transfer this knowledge and experience. The focus should be on making the transfer as efficient and beneficial as possible by involving all members of the organisation who will be affected by the process, i.e. managers, experienced employees and new recruits.

The link German DP, Soziale Innovation GmbH, developed a method of knowledge transfer, the 'Tandem Partnership', between experienced employees and new recruits. Following initial training of the trainers on how to teach others, the experienced employees taught and passed on their skills to new company recruits. The process lasted approximately 1 -2 months with workstations being transferred from one employee to another during this time.

Theme 3: Promoting Diversity

There is a need to address existing perceptions of older workers and the misconception in some quarters that old(er) age equals inability. This can be done in various ways, for example through:

- Media portrayals of older people focusing on the skills and values that they possess as opposed merely to their age, and through the use of positive examples of the older workforce. Promoting diversity within organisations and society more generally relies on positive messages being relayed by the media and senior managers.
- Diversity in the workplace. Employers should recognise the contribution that each employee can bring to the organisation. In order to incorporate the individuality of each employee, organisations need to consider new ways of thinking and training.

Through training employers to manage diversity, the Irish TRED DP enabled a number of organisations to attract a more age and culturally diverse workforce. Executives within the targeted organisations now recognise that some employees are at risk of redundancy due to outsourcing and have developed further training to make such employees more attractive to prospective employers. The work has involved development of the accredited Foundation Diploma in Equality and Diversity and has been so successful that it is now used by Police forces in Ireland.

Theme 4: Together in Europe.

Despite differences in national contexts, Member States face similar problems when it comes to an ageing workforce. It was therefore decided to focus on the transnational element of EQUAL and the way in which it has facilitated the sharing of experiences and transfer of good and innovative practices. In addition to mutual learning, the transnational work had a range of concrete outputs such as websites, vocational support, pedagogical tools and visibility conferences.

A number of transnational partnerships focused on issues relating to age management. These include The Transnational partnership, WISER, which encompassed three DPs from France, Germany and England that all worked on ways to improve the adaptability of older and low-qualified workers, and sought to develop approaches for retaining employees and increasing their skills. As part of the transnational cooperation, the French partner opted to test the concept of the "Work Place Coordinator" (an "on-the-work-floor" human resource function) developed by its English partner. It also adopted a workshop methodology for on-the-job training in SMEs originally developed by its German partner.

3.3. PATTERNS AND TRENDS IN THE SECOND ROUND

This section presents the results of new analysis of the 55 age management DPs in the second round of the Adaptability pillar. The analysis is primarily based on a detailed assessment of the DPs' stated objectives and intentions in the ECDB. It is supplemented by knowledge of specific DPs as a result of on-site visits and case studies undertaken so far during the second round.

The basis for the analysis has been the three themes of the Competence 50+ 2007 Conference, namely:

- Theme 1: Learning and qualifications

- Theme 2: Workplaces in change

- Theme 3: Altered conditions and attitudes in the labour markets

Against each of these themes, it has been possible to assess the DPs' activities in terms of their:

- Operational objective – what they are seeking to achieve on the ground

- Scope – the focus and coverage of their work in territorial, sectoral and/or organisational terms

- Target group – the primary beneficiaries of their activities

- Method – the particular tools and/or approaches used to achieve their operational objectives

Given the relatively small sample of DPs, it must be emphasised that the results of the analysis are only indicative at this stage. Further analysis in the future - involving more visits, case-studies, survey work etc. - would further develop our understanding of the DPs concerned.

3.3.1. Operational objectives of the age management DPs

As a starting point, the diagram below indicates the proportion of age management DPs according to the three conference themes. As each DP is addressing a multitude of issues (possibly under several of the conference themes), the proportion was established by summing up how many of the 55 sample DPs work with operational objectives that relate to each of the three broad conference themes. In other words, the diagram below does not reflect any specific number of DPs, but rather how often they have addressed a specific operational objective.

Diagram 3.7 - Proportion of age management DPs according to the conference themes
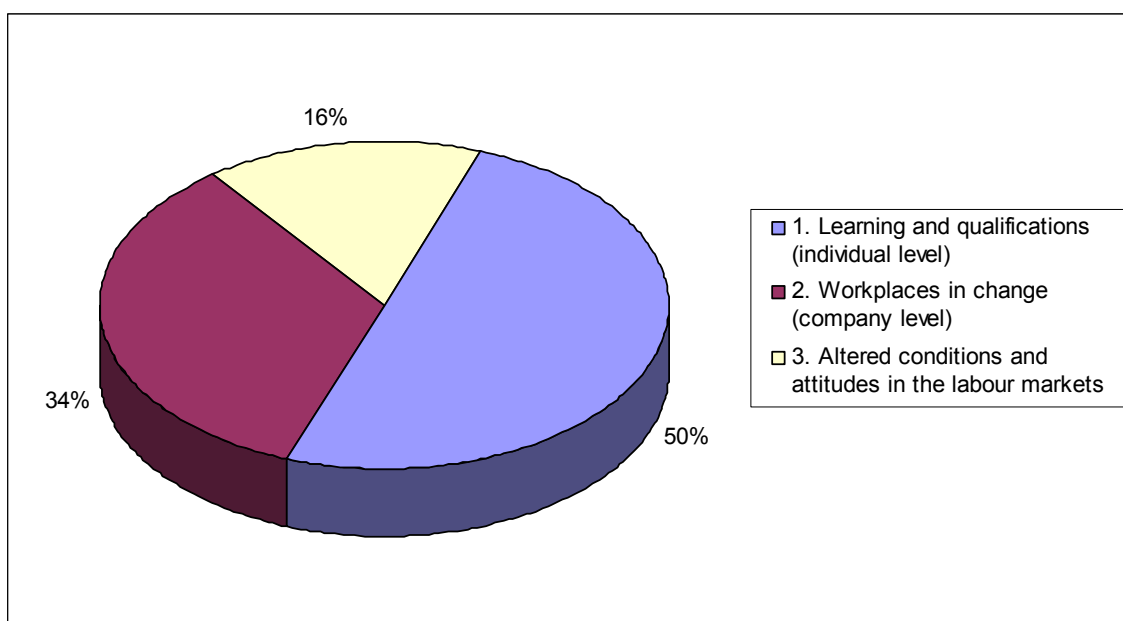
For each of the conference themes, it is possible to identify and categorise the DPs according to a number of operational objectives. Due to the fact that most partnerships are working with a multitude of interrelated objectives, measures and target audiences, the categorisation and relative importance of the assigned categories can prove difficult and lead to somewhat 'fluid' results. However, these results still provide interesting insights into what the DPs are focusing on in relation to age management.

Table 3.8 - Theme 1 - Learning and qualifications

Operational objectives	No. of DPs working on the operational objective
Increasing duration of workers work	8
Improving work life balance	4
Improving occupational health	1
Providing new soft skills	14
Providing new specialist skills	5
Improving ICT literacy	11
Preserving or improving employability	30
Facilitating access to lifelong learning	10
Expanding career options	6
Improving self-esteem, confidence, motivation etc.	6
Total	**95**

Table 3.9 - Theme 2 – Workplaces in change

Operational objectives	No. of DPs working on the operational objective
Improving the understanding of the situation	8
Improving resource management	2
Increasing workplace flexibility	3
Improving health and safety standards	3
Improving human resource management	16
Improving transfer of knowledge or intergenerational learning	12
Improving the adaptability of companies	11
Changing employer attitudes	3
Improving employer collaboration and knowledge	4
Promoting continuous learning and personnel development	3
Total	**65**

Table 3.10 - Theme 3 – Altered conditions and attitudes in the labour markets

| Operational objectives	No. of DPs working on the operational objective
Anticipating future skill needs	1
Improving access to employment	8
Anticipating demographic trends	9
Training/facilitating business start-ups (promoting entrepreneurship)	2
Promoting social dialogue	4
Developing inter-organisational approaches	6
Total	**30**

It can be said that the strategic objectives under theme 1: Learning and qualifications are the most prominent amongst the age management DPs: there are at least 95 instances where DPs are addressing objectives in this field, 65 instances under theme 2: Workplaces in change, and 30 under theme 3: Altered conditions and attitudes in the labour markets. These figures are probably influenced by the fact that there are more operational objectives to select from in themes 1 and 2 compared with theme 3. However, the prominence of theme 1 is still reinforced – and partly explained - by the fact that a higher proportion of the DPs in the sample are funded under the Lifelong learning thematic field of the Adaptability pillar. These DPs tend to focus on promoting learning, training and personal development opportunities for marginalised groups, which clearly mirrors theme 1: Learning and qualifications.

As expected, the assessment revealed that the DPs are addressing multiple operational objectives, in some cases cutting across the themes. On average the DPs are working with 3.45 operational objectives, but some are going as far as to address up to six or eight.

3.3.2. Scope of the age management DPs

Based on the DP descriptions, it is possible to discern (in most cases) the scope of the DPs' activities. As the diagram below illustrates, most of the age management DPs are active in developing measures to support SMEs (39%). The second most popular scope focuses on one or more particular regions (31%), followed by a sectoral approach (25%). Finally, actions intended to help large enterprises only amount to 5%. There are also cases in which DPs refer to operations in more than one context, for example in developing measures for SMEs within a particular region or sector.

Diagram 3.11 - Proportion of age management DPs according to the scope
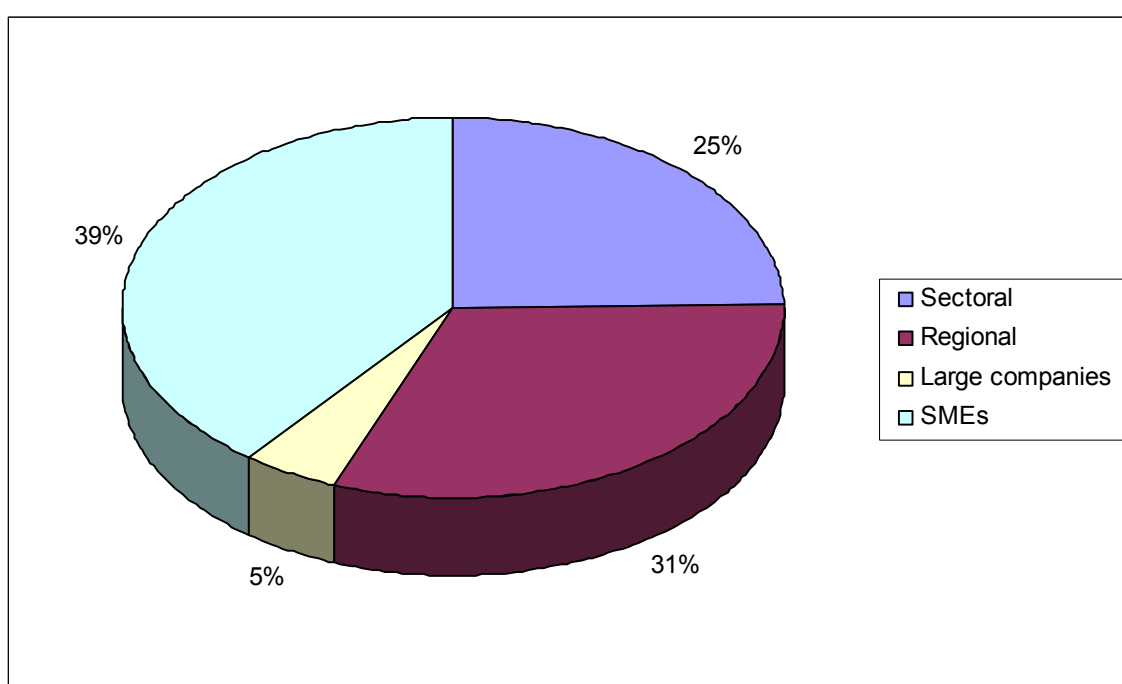
The SME focus is particularly encouraging and not uncharacteristic of DPs in the Adaptability pillar more generally. The situation of older workers within smaller businesses can be more challenging due to the company's own lack of human resource infrastructure and policies to deal with issues such as ageing. Innovative interventions by EQUAL DPs are therefore beneficial in this area.

3.3.3. Target groups of the age management DPs

As illustrated in Diagram 3.12 below, the Adaptability DPs working on age management target their activities and measures at a wide variety of beneficiaries. Unsurprisingly, the target group most often mentioned in the DP descriptions is older workers (32%), with quite a large proportion of DPs specifying that their measures are intended to support and empower older female workers specifically (11%). This proportion could be even higher given that the 32% mentioned does not have a gender specification. An additional 4% of the partnerships endeavour to provide support to older unemployed workers and 2% to older workers with a migration background. In total, these four groups of older workers constitute 49% of all the Adaptability DPs dealing with age management issues.

The second largest group addressed by the Adaptability DPs is employers. An estimated 13% of the partnerships are working to develop measures to improve awareness and skills, as well as to provide tools for better age management to employers. Other important target groups addressed by the partnerships are public servants, administrations, and employment agencies (7%), social partners (7%), younger workers (usually in the context of knowledge transfer and to increase the attractiveness of the sector) (5%), and line managers (4%). DPs have also developed measures for human resource managers, policy makers, training and support providers, the general public and other target groups.

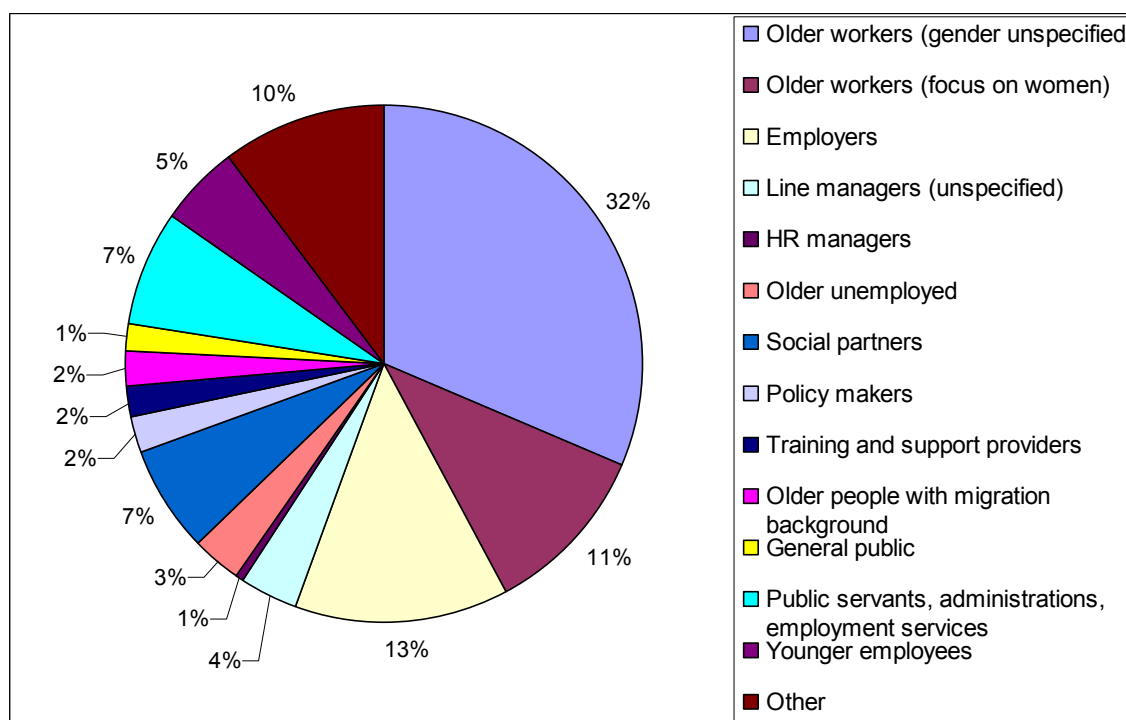**Diagram 3.12: Principal target groups of the age management DPs**

Table 3.13 below shows the distribution of target groups, both in terms of the numbers and percentage of Adaptability DPs working with age management themes. Again, this analysis is based on the descriptions of DP objectives and planned activities on the ECDB, and the figures should therefore be viewed as suggestions of the proportion of the target groups addressed rather than absolute numbers. The distinction between target groups and their relative importance was made harder by the fact that on average DPs work with 2.5 target groups. A figure which could be even greater as some activities are touching a multitude of audiences, not all of whom could be listed in the ECDB DP descriptions.

Table 3.13 - Principal target groups of Adaptability DPs working with age related issues

The principal target groups of the age management DPs	No. of DPs	% of DPs
Older workers (gender unspecified)	43	32%
Older workers (focus on women)	15	11%
Employers	18	13%
Line managers (unspecified)	5	4%
HR managers	1	1%
Older unemployed	4	3%
Social partners	9	7%
Policy makers	3	2%
Training and support providers	3	2%
Older people with migration background	3	2%
General public	2	1%
Public servants, administrations, employment services	10	7%
Younger employees	7	5%
Other	14	10%

3.3.4. Method of the age management DPs

The analysis reveals that the age management DPs use up to four methods to work towards the various objectives they have set. On average, each DP uses 1.7 methods. However, this is probably an underestimate as many DPs do not mention the main methods they use in their ECDB descriptions.

Despite the possible underestimate, the DP analysis clearly reveals that training and vocational training (34%) are the methods most often used by the partnerships working with age management. Such training is mostly targeted at employees and older workers excluded from the labour market. However, target groups trained also include employers, managers, human resource managers, public servants, employment agency workers and others. Positive promotion and awareness-raising campaigns and/or activities are the second most widely used method (20%). This method mostly involves SME employers, but can also include older workers themselves; at times it is also targeted at a whole network of public and private organisations in a particular region or sector, or indeed the general public as a whole. Other popular methods are guidance and counselling (19%), and skills assessment and audit (11%), both of which apply mostly to older worker as a precursor to training or other measures aimed at retaining or returning older workers to the labour market. DPs also employ methods of strategy and action plan development, exchange of information and good practice, and various anticipatory measures and observatories in order to achieve their objectives.

**Diagram 3.14 - Methods used by the age management DPs**
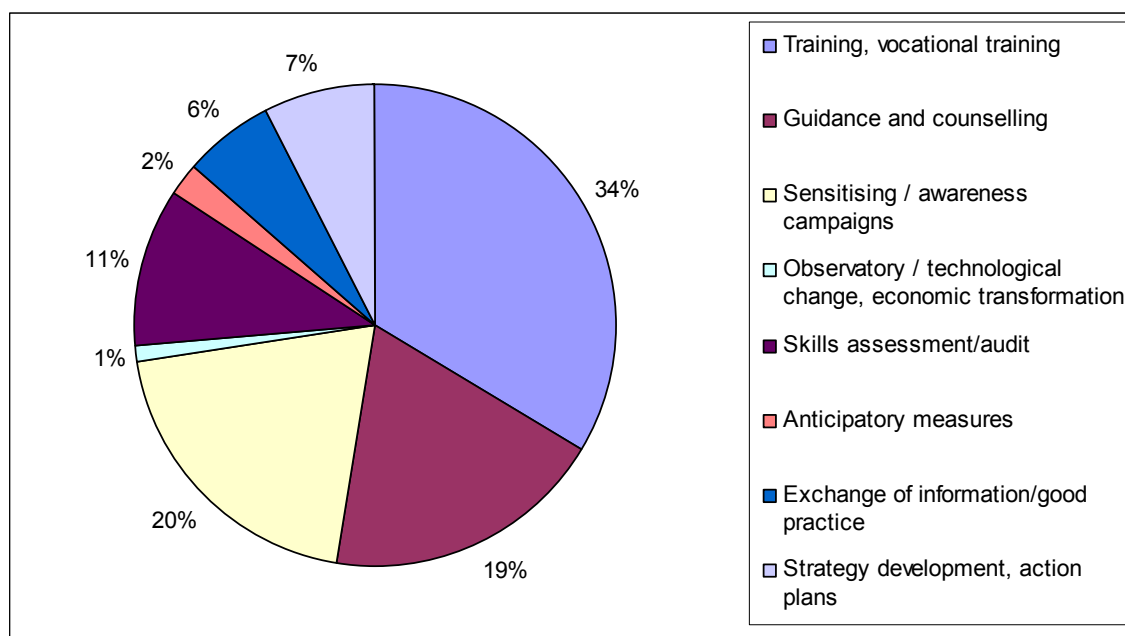
DPs also employ a wide variety of tools to take forward the issue or solve the problem(s) that they are addressing. The partnerships use up to seven different tools in their work towards the agreed DP operational objectives, excluding the various tools employed to create and manage the different aspects of the partnership working and financing. However, as already described above, this is probably an underestimate given the large number of goals and target groups addressed, as well as the fact that not all partnerships explicitly describe all the tools they intend to use during their life-circle in the ECDB. Regardless of this issue, the analysis of the age management DPs serves well in sketching out the main tools used by the partnerships to work with their target groups.

Various research, evaluations, studies and articles (17%) constitute the most prominent tool to assess the social, economic or legal context that the DPs are operating in, the situation of a particular target group and/or the extent of an age management-related problem. The second most common DP tool is the development of methodologies or guides (16%) to establish a certain systematic way in dealing with a problem or process related to the management of an older workforce. Other prominent tools in implementing DPs' activities are experimental pilot projects (14%) and the creation of networks, platforms, forums or discussion/interest groups that can enable better and more coordinated work toward a chosen objective by involving a multitude of relevant stakeholders (12%). Further tools used by the DPs are mentoring schemes (12%) to guide older workers or offer them new employment possibilities as mentors, introducing or experimenting with new, flexible forms of work (9%), development of instruments to support human resource management or to create holistic human resource management systems (9%), development and use of IT knowledge management tools (6%), and organisation of conferences, forums, seminars and workshops (3%), often with the aim of dissemination or awareness raising and pooling of knowledge (2%).

As indicated by Diagram 3.15 below, the spread in the frequency of tools employed by DPs is rather even, with no predominant single tool standing out. This is an indication of the originality of the DPs in searching for ways to address the issues and problems they are engaged in solving. It should also be noted that the classification of tools undertaken in this section downplays the creativity and the multitude of contexts that these tools have been and are employed in.

**Diagram 3.15 - Tools used by the age management DPs**
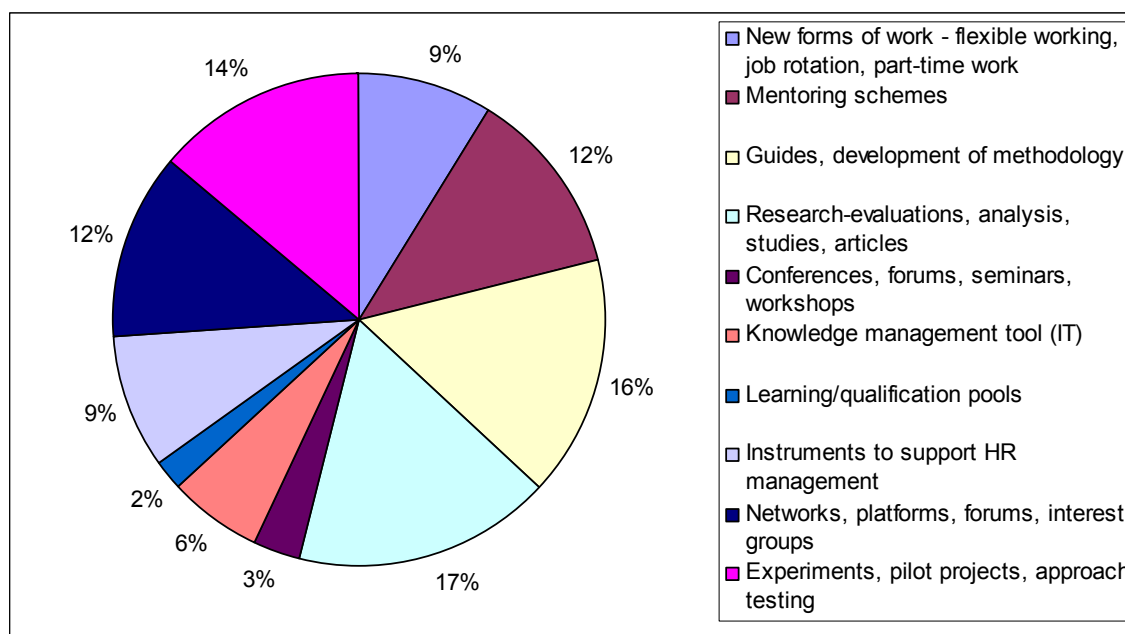
3.3.5. Learning and qualifications

Where as the previous sections have reviewed the age management DPs in terms of their operational objectives, scope, target group and method, these next three sections examine the DPs in terms of each conference theme. This includes some short examples to illustrate the DP activities undertaken.

Please note that all of the information presented in all of these section relate to the sample of 55 age management DPs.

For Theme 1: Learning and qualifications, it is possible to draw on the experience of age management DPs working with various 'target groups' of older people both within and beyond enterprise. The work includes improving people's access to learning and qualifications, the assessment and valorisation of skills and competences, as well as improving one's motivation and career possibilities. The activities of the DPs focusing on improving ICT literacy, preserving or improving the employability, facilitating the access to lifelong learning and new soft skills working would be of particular interest under this theme.

Diagram 3.16 - Percentage of age management DP activities under Theme 1: Learning and qualifications
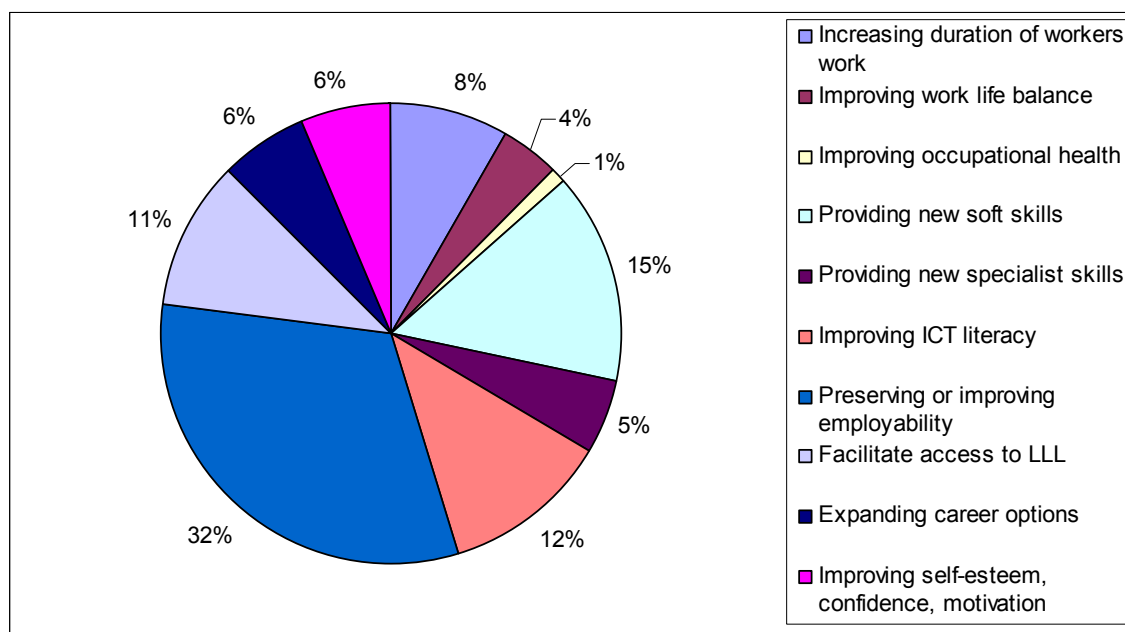
The three operational objectives most addressed by age management DPs under this theme are 'preserving or improving the employability of older workers' (30 DPs), 'providing new soft skills' (14 DPs) and 'improving IT literacy' (11 DPs). Surprisingly, there are relatively few DPs in the sample dealing with occupational health, which is an important part of the age management agenda. Likewise, the focus on 'improving the work-life balance' is limited despite this being an issue of increasing importance for both female and male target groups.

The subsections below describe and provide examples of DPs that are addressing the most significant operational objectives:

Preserving and improving employability

With 30 DPs preserving and improving the employability of older workers, this objective is clearly the widest area of work. In the examined sample, 11 DPs have explicitly listed employability as one of their objectives. In addition, 19 DPs are implementing measures promoting employability without a direct reference to this concept.

Employability is promoted in a number of ways and using though various methods. Some of these include:

- Research on employment conditions and ageing trends, as well as the exploration of new possibilities of preserving long-term employability in SMEs (KEEP BEnl-31)
- Development of strategies for improving the staff development, recruitment processes in SMEs aimed at preserving the employability of an ageing work force, and creation of an age-compatible work place (KEEP BEnl-31)
- Strengthening the employability of older people though the provision of the necessary skills that would enable them to be successful in the job market; (WIR Wesentliche Ideen Realisieren - Wandlungskompetenz in der Region Neckar-Alb DE-XB4-76051-20-BW/209)
- Promoting employability by making regional companies, SMEs, associations and policy makers aware of the need to address the issue of 'demographic change' and 'internationalisation' and to develop action plans for how to do so (FAIR plus DE-XB4-76051-20-BY/201)

- Increasing the job chances of older employees by activating and promoting their vocational competencies throughout their entire working life (FAIR plus DE-XB4-76051-20-BY/201)
- Strengthening long-term employability by providing the necessary qualifications to respond to the requirements of information society and structural change (Aktiv-net - Aktivierung der Potenziale von KMU und Kooperation in Netzwerken DE-XB4-76051-20-MV/200)
- Development of competences that fuse qualification and practical training to increase the competitiveness of companies and to help ensure the employability of employees (Aktiv-net - Aktivierung der Potenziale von KMU und Kooperation in Netzwerken DE-XB4-76051-20-MV/200)
- Promoting employability through the development of individual action plans and competence based skills and ability development and training. To be accompanied by mentoring and coaching services (ESÉLLYEL A MUNKAVILÁGÁBAN HU-17)

Name of DP: Generations - Berlin integriert Erfahrung

Lead organisation: Berliner Verband für Arbeit und Ausbildung

Member State and link to ECDB: Germany DE-XB4-76051-20-BE/215

Description: The Berlin DP, "Generations", aims at reconstruction and preservation of the employability of senior employees. It promotes the integration of older workers' capacities into different working and social contexts, the adaptation of work related structures to the needs of older employees as well as the development of multigenerational projects that create suitable work for older and younger people in different types of employment.

The individual projects of the DP regard employability as the capacity of the individual to be a 'business person' in his own interest, to actively work for the preservation of his capacities, as well as the capacity of firms to regard their staff as contracting parties and valuable resources (organisational employability).

The DP also seeks to preserve or restore the employability of women over 45 who have had limited or no access to the labour market by providing mentoring and coaching services, which should secure a sustainable integration of women in the labour market in combination with qualifying measures.

Berlin "Generations" equally strives to stabilise and professionalise new businesses in the third sector by transfer of technical and commercial knowledge through the creation of a generation workshop in which older and younger jobseekers together create a tourism business in their community. Thus, the employability of older and younger people shall be increased within a regionally growing sector as well as through sustainable offers of employment created in a third sector business.

Providing new soft skills

A total of 14 DPs focus their activities primarily on the provision of new soft skills to older employees. The concept of soft skills in this analysis includes all skills that are not related to (further) education in a particular profession or to learning a new one. Both "basic skills" and "transferable skills" were interpreted as soft skills.

There are several ways that DPs work on the provision of soft skills. These include among others:

- Development of a methodology for supporting the continuing education of older workers within companies by designing courses (content and methodology) and increasing staff motivation to improve their qualifications, credentials, flexibility and active professional involvement. The courses should also help the participants to improve their self-

evaluation, self-motivation skills and interpersonal skills (communication, teamwork, negotiation etc.) (Third Career CZ-72)

- Providing and adapting support with skills assessment, validation of work experience and training schemes to all of the company's workforce; (GESTION DES HOMMES ET DEVELOPPEMENT ECONOMIQUE ET SOCIAL (GEHODES) FR-CEN-2004-42862)
- Promoting the validation of acquired skills in order to encourage job evolution for experienced workers; (PARCOURS D'AVENIR FR-NAT-2004-41485).
- Providing direct support to employed and unemployed older workers by establishing an Older Workers Employment Network (OWEN) that can provide an holistic approach to Advice and Guidance (IAG), training and learning opportunities including in Information, Communication Technology (ICT), basic/key/soft skills and sector and locality specific skills. (Older Workers Employment Network (OWEN) UKgb-151)

Name of DP: CAP SUR LA PROFESSIONNALISATION

Lead organisation: INSUP Formation

Member State and link to ECDB: France FR-AQU-2004-42342

Description: The DP will bridge the gap between employment supply and demand through the development of associated skills for the target groups (65 % of whom are women) and by offering a gender analysis of the results per action and per partner, as part of a shared diagnosis aiming at improving women's employment status.

The DP will offer specific training modules on family engineering. The courses will be designed on the basis of women's experiences and will be accessible on demand. The partnership will support the definition, recognition and promotion of transferable inter-professional skills through the follow-up of the training pathways: recruitment, access to employment and on-the-job support.

The actions aim at adapting and developing the skills of low qualified workers to favour their access to the labour market.

A "Database of Associated Skills" will serve for the design of experimental tools and methods for the target groups and enterprises. It will include shared diagnoses, experience-based tutoring, employment resource centre, etc. The associations involved in the DP will to promote the recognition of family engineering. The other tools made available will include access to ICT and use of the network for tele-training.

The DP will also provide contracts and periods of vocational internships by developing a "Common portfolio" of core skills through the use of Organisational Development and Training (ODT) to match the needs of understaffed professional sectors.

Improving ICT literacy

Improving ICT literacy is the third biggest operational objective (11DPs). As the examples below illustrate, the benefit from ICT can be two-fold – training in ICT may be the missing link to employment, but ICT itself can also be a tool for better and more accessible training:

- Extending labour opportunities and reducing the insecurity for employees who face discrimination due to their sex, age and nationality by the upgrading of their qualifications and knowledge of new production methods and work models and by helping older employees develop their basic ICT skills; (ΤΕΧΝΟΓΝΩΣΗ GR-232164)
- Educating and mobilising "older workers" as mentors/tutors to guide the education of the target groups and to transfer, secure and store the knowledge of older workers in training programmes. The DP uses ICT to train the target groups 'in company' and offers the content through the Internet (In de LIFT NL-2004/EQF/0007)

- Developing information systems and preparing a project that will help older employers complement their knowledge of ICT, so that they can match the company's expectations. (Dojrzałość wykorzystuje wiedzę PL-61)
- Carrying out social auditing of organisation's older workers and corporate social responsibility practices, leading to the development of a recognised organisational award supporting work life balance and inclusive work practices, adaptability and use of ICTs. (Tick-Tock! UKgb-95)

Name of DP: E-mentoring for Equality in Employment (e3 DP)

Lead organisation: University of Wales, Lampeter

Member State and link to ECDB: United Kingdom UKgb-169

Description: The DP aims to promote inclusive working practices and adaptability, using ICT to promote diversity and work life balance in small enterprises in rural Wales. It aims to overcome hurdles to this end, including effective adoption of ICT within the firms and the realisation of the employment potential of those whose work life balance aspirations are not stereotypical, principally older workers and people with care responsibilities. It will use ICT techniques to enhance learning among network members, such as e-mentoring, and enable disadvantaged target groups to benefit from them.

3.3.6. Workplaces in change

Theme 2: Workplaces in change is the second biggest conference theme covered by the age management DPs. The theme covers DP measures and activities dealing with the experience and good practice in age management at the entrepreneurial level. This includes the practices and approaches employed by DPs for improving human resource management, facilitating the transfer of knowledge (or intergenerational learning within a company), and fostering the adaptability and competitiveness of companies by working with owners/managers to devise company-wide age management measures.

As illustrated by the diagram below, the three most prominent types of operational objectives are: improving human resource management (16 DPs), knowledge transfer within the enterprise (12 DPs) and improving the adaptability of companies (11 DPs).

Diagram 3.17 - Percentage of age management DP activities under Theme 2: Workplaces in change
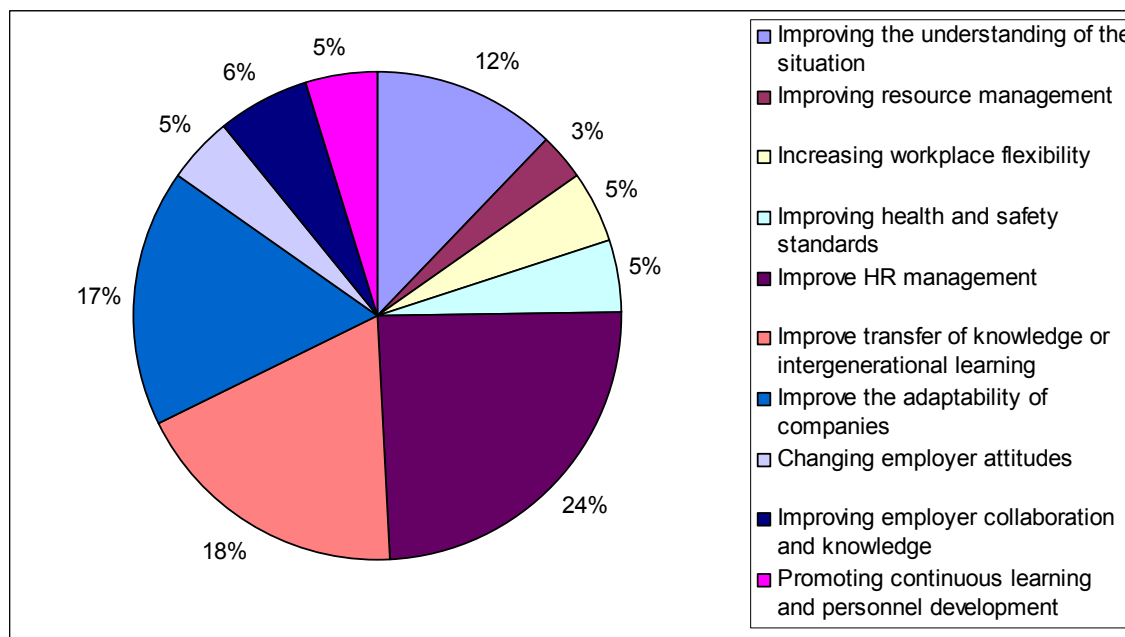
By way of illustration, here follows a few examples of the DPs that are addressing the most significant operational objectives.

Improving human resource management

With 16 DPs developing measures for the improvement of human resource management, it is the best covered operational objective. The measures and actions developed by the DPs aim at the inventorying, development, guidance and implementation of better human resources management. A few examples include:

- Age management in Martinique with the goal of retaining older employees in work longer and providing them with attractive carrier opportunities. DP measures include skills mapping (considering gender perspective) for companies and the development of an age management methodology; (GESTION DES AGES, GESTION DE L'EMPLOI (GAGE) FR-MAR-2004-42123).
- Increasing the level of employment for the over-50s focuses on seniors and employees that will be seniors though the employment of anticipatory measures as a part of a holistic human resources approach which includes access to training, maintaining competences, mobility and employability, promoting gender equality in employment and training as well as vocational training for women (AGES ET PARCOURS FORMATION FR-PDL-2004-41348).
- Adapting the employment market to senior predominance through diagnostic studies to inform and improve enterprise organisation as well as through the provision of guidance in new human resource practices (GESTION DES @GES ET DES COMPETENCES FR-LGR-2004-43731).

Name of DP: Senior Select Retain and Retrain

Lead organisation: Chambers of Commerce of Ireland

Member State and link to ECDB: Ireland IE-37

Description: The DP addresses demographic change in Ireland by changing the attitude of employers, upskilling and re-skilling workers and developing flexible working arrangements. It promotes choices for the older worker and has set up an employment agency run by older people for older people (for both employers and employees). Senior Select Retain and Retrain also aims at influencing the policy with regard to needs of older workers, produces evaluations of existing difficulties in older worker retention, identifies appropriate lobbying strategies for inclusion, recruitment and training or older workers as well as undertakes research to identify sectors under and over represented by older people and design best practice in age management.

Knowledge transfer within the enterprise

The transfer of knowledge within an organisation is crucial in providing new employees with skills indispensable for a good and competitive operation of the enterprise, on the one hand, and in providing older employees with the skills that can be easily taught by the young, on the other. In an age when each labour market participation counts and when productivity has become one of Europe's prime concerns, it is crucial not to lose the professional and interpersonal knowledge of older employees upon their retirement. The exclusion of older workers who wish to work becomes unacceptable.

Adaptability DPs offer the following solutions to promote the intergenerational transfer of knowledge within enterprise:

- Increasing the involvement of older employees and making the transfer of knowledge as successful as possible between 45+ and their younger colleagues (intergenerational learning). The gain for older workers is a new career possibility and challenge. Awareness raising amongst older workers of the fact that knowledge transfer is important and does not necessarily entail a threat, but an opportunity, is essential (K+50 BEnl-17)
- Developing and testing intergenerational and age-appropriate concepts in the fields of personnel planning, personnel development and personnel policy. Re-integration of older unemployed people and promotion of intergenerational co-operations; (FAIR plus DE-XB4-76051-20-BY/201)
- Promoting a collective approach to the development of intergenerational linkages in the workplace and the development of a sympathetic working environment. (MOSAIQUES FR-NAT-2004-43690)

Name of DP: GENERATION BRIDGE

Lead organisation: EUROBIC ABRUZZO E MOLISE S.c.r.l.

Member State and link to ECDB: Italy IT-IT-G2-ABR-007

Description: The primary goal of the DP is to improve the working conditions of new recruits and to limit marginalisation of senior workers by repositioning senior workers inside companies. Older workers are encouraged to take up the role of mentor, this way reducing the generational clash and capitalising on older workers' skills and competences. The DP intends to create a skills database, understand and experiment with knowledge transfer patterns and evaluate the implementation of the training actions aimed at new recruits of 30 SMEs.

Improving the adaptability of companies

With 11 DPs, improving the adaptability of companies is the third biggest operational objective. The adaptability of companies is a concept that could entail a broad range of measures. The DPs' solutions in this area include:

- Evaluation of companies' age management skills needs in agriculture and industry sectors (focus also on youth and women); (ENTREPRISES ET PROFESSIONNELS DE L'EMPLOI : MEILLEURE QUALITE DU TRAVAIL FR-AQU-2004-42740)

- Addressing the low employment rate of senior workers in the West Normandy SMEs by job mentors training and training of women as mentors; (ATTR@CTIVITE ET ANTICIP@TION FR-BNR-2004-41126)
- Launching a programme of experimental actions targeted at social partners within SMEs and larger companies to reinforce social partner capacity to prevent discrimination against older workers and improve age management (GESTION DES AGES EN ENTREPRISES : DU DIRE AU FAIRE FR-IDF-2004-43714)
- Encouraging inclusive employment through open human resources practices, development of systems for the recruitment, progression and promotion of an inclusive and diverse workplace, diversity management in private companies of Dublin health sector and the promotion of better understanding of diversity management in the public sector (EQUAL at Work IE-38)

Name of DP: Aktiv-net - Aktivierung der Potenziale von KMU und Kooperation in Netzwerken

**Lead organisation: Wissens- und Kooperationsnetzwerk OMV e.V.**

Member State and link to ECDB: Germany DE-XB4-76051-20-MV/200

Description: The DP is supporting the adaptation of companies by integration of older and female workers, providing older workers with IT skills, learning strategies and techniques which allow for the active participation of older workers in the development of the company and extension of the work-life cycle. Measures aimed at older workers are one part of the regional employment strategy.

3.3.7. Altered conditions and attitudes in the labour market

Altered conditions and attitudes in the labour market is the conference theme that is the least covered by the age management DPs. This section examines the 16% of DPs working on a broader, sectoral or territorial level to improve the political, economic and legal frameworks for better age management. This covers, amongst other issues, facilitating or improving collaboration between employers, public agencies, and social partners at the macro level, creating awareness of the importance of age management issues among these and other actors, and creating incentives and making the labour market more attractive to older workers.

Diagram 3.18 - Percentage of age management DP activities under Theme 3: Altered conditions and attitudes in the labour markets
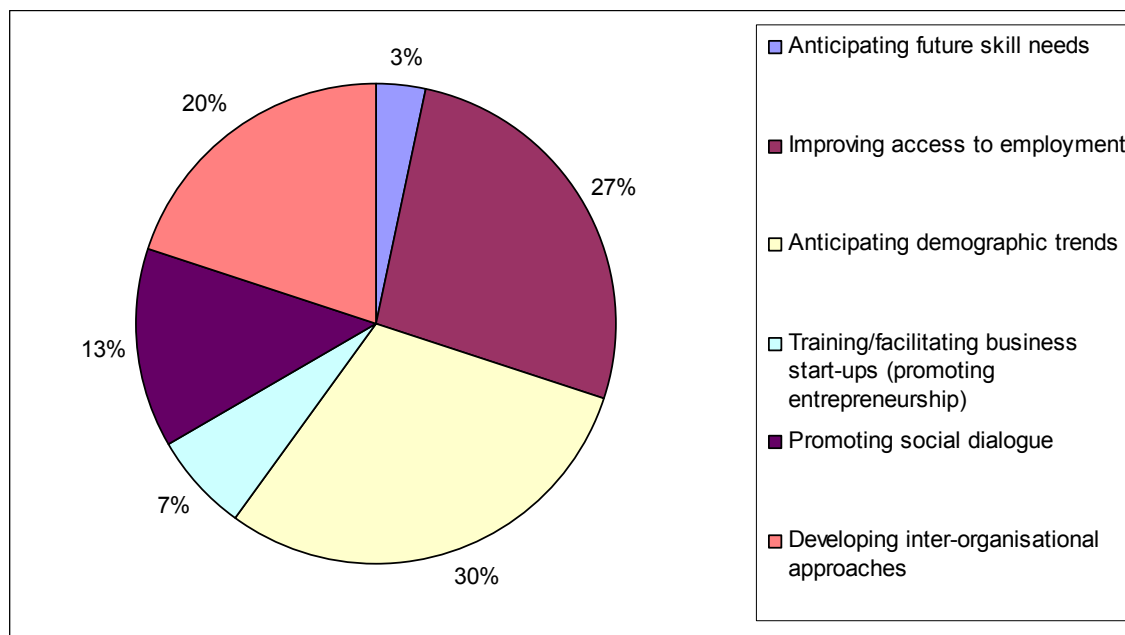
The three most significant operational objectives under this broad conference theme are 'anticipating demographic trends' (9 DPs), 'improving access to employment' (8 DPs) and 'developing inter-organisational approaches' (6 DPs). The main measures taken by DPs under these operational objectives are illustrated by examples in the sub-sections below.

Anticipating demographic trends

Due to the ageing population in Europe, anticipating demographic trends has become a priority of policy makers, companies and individuals alike. There are nine age management DPs that have implemented actions primarily in this area. In the spirit of EQUAL, the idea has been to launch programmes that unite the efforts of social partners and other relevant stakeholders in developing timely and widely accepted age management policies and practices.

Name of DP: Tick-Tock!

Lead organisation: Berkshire LSC

Member State and link to ECDB: United Kingdom UKgb-95

Description: The DP searches for innovative ways to deal with the issues of the ageing population, its impact on the labour market and society at large. It works on the development of social capital, better ways of working, practical cross-generational pilots and guidance for older people. Tick-Tock! wishes to increase the role of volunteering in management of consequences of the demographic change. By linking private, public and NGO information sources the partnership has created U-work Centres, which are building upon existing provision to provide a holistic approach virtual and physical, covering volunteering opportunities, training, validation, recruitment opportunities, jobcarving, jobrotation, linking private, public, voluntary information for older people.

Improving access to employment

Improving access to employment for those excluded from or long-term inactive in the labour market, especially marginalised and vulnerable groups, is one of the central themes of EQUAL. There are eight age management DPs working to facilitate the access of older people to employment through sectoral or regional scale measures:

- Bringing the importance of territorial approaches to the age management by facilitating the return to the labour market of unemployed persons over 50 by means of a territorial mobility platform; (IMPACT EN PACA - INITIATIVES POUR LA MOBILITE PROFESSIONNELLE - AGE, COMPETENCE FR-PAC-2004-43465)
- Developing IT competencies to counteract the discrimination and exclusion of older employees from the labour market, and developing suitable computer training programmes for SME training centres (Partnerstwo na rzecz rozwoju kompetencji informatycznych w Polsce PL-82)

Name of DP: South West Opportunities For Older People

Lead organisation: University of Exeter (Marchmont Observatory)

Member State and link to ECDB: United Kingdom UKgb-129

Description: This DP focuses on older individuals suffering discrimination within and outside the labour market. The partnership involves and unites employers, regional planning agencies, regional government, information and training providers, NGOs, regional level agencies working on equality. The DP also implements Community of interest platform to improve interaction of partners, develop materials and new skills though personal portfolios, inform employer attitudes on age discrimination, develop systems for coaching and mentoring for and by older people, develop training programmes, e-portfolio and to do mainstreaming.

Developing inter-organisational approaches

Partnerships with their partner experience and resulting synergies are a fundamental characteristic of EQUAL undertakings. However, apart from being partnerships in their own right, DPs also promote wider cooperation between policy making and business actors on addressing the issue of age management:

- Engaging employers, social partners and NGOs to enable permanent education and qualification for older people with the aim of integrating and reintegrating them in new work processes, to prevent unemployment and to preserve work places for older people. Qualification of trainers, middle management and coaching for older employees (COACHINGOM DO VARNE STAROSTI SI-21)

Name of DP: SKY Sviluppo delle Competenze attraverso l`Apprendimento Innovativo

Lead organisation: Modena Formazione Srl

Member State and link to ECDB: Italy IT-IT-G2-EMI-014

Description: The DP is targeting workers at risk of exclusion because of age or outdated competences. It is addressing the needs of low skilled older workers and other marginalised groups through individualised training to develop key skills for mechanic production and social sectors. Other DP target audiences are training providers, NGOs, public bodies and companies that will benefit from a better understanding of local skills needs, methodologies for preparing the target groups; study to understand sector needs, preparation of training pathways, methodology and guidance development, training testing, creation of cross-sector networks to plan future support activities and to reinforce the mainstreaming capacity.

3.3.8. Thematic events

Aside from the above new analysis of second round DPs, it is worth mentioning two events that have taken place during the second round of particular relevance to age management.

Adaptability Peer Review

On 3 – 4 October 2006, the Polish Managing Authority organised a Peer Review centred on the work of DPs in the Adaptability pillar. The review was designed to provide the participating DPs with the opportunity to exchange their experiences and examples of good practice together with representatives from the EQUAL Managing Authorities of different countries and the Polish Ministries of Regional Development, and of Labour, as well as Polish trade unions.

Age management was one of the four themes addressed by the Peer Review, mainly in a collaborative workshop format. The DPs invited to showcase this theme were: Skills Analysis (UK), Dynamism and Experience (Polish), B.Sapiens (Portugal) and Emperia (Greece). The main messages arising from the workshop discussion were that:

- Older workers are often sceptical about the effectiveness of learning at their age and they are reluctant to undergo school-type training; this is why the DPs showcased have developed interactive forms of learning in order to motivate and engage older people

- It is important to put in place awareness-raising campaigns for employers who still do not recognise the importance of being age positive

Social partner event

On 30 May 2006, a social dialogue event was organised in Brussels entitled "Social Partners' Groundwork on Innovation". Bringing together over 200 participants (from social partner organisations, academic bodies and the Commission institutions), the event was intended to present the experience and achievements of EQUAL DPs in relation to four themes, one of which was active ageing.

Two interesting DP examples were presented in relation to the active ageing theme.

- The French DP called "A tout âge" (which now participating in the second round "Entreprendre Transmettre Accompagner pour l'Emploi") "is aimed specifically at the over 50s in the territory of a department (Charente Maritime): building a platform of mutualised services for job-seekers or those wishing to change job or hand over or start their own business. This DP is interested in the resources made available to favour consultations between the companies solicited by the Caisse d'Epargne, the work councils mobilised by a regional documentation centre (CREDES), the ANPE, other association networks (for example, the regional association for the improvement of working conditions) and the older workers themselves. Putting in place these exchanges can therefore be reproduced not only in other localities but also in the European context

- The German DP called NETAB chiefly aims to raise awareness among companies and unions of the question of the ageing active population. This is because, in a context of unemployment and access to early retirement in Germany, neither the companies nor the unions are particularly focused on the employment of older workers. This DP was guided by a training organisation in the automotive industry sector (BNVHS)and the aims were: developing an innovative human resources policy focused on the integration of employees aged over 45 in the metallurgical and automotive industries; conducting studies involving target groups with the intention of giving them a greater sense of responsibility; organising workshops within companies with a view to informing them and

raising their awareness of the fact of older workers; and lastly devising training programmes to help older workers better adapt to new technology." [63]

The event lead to the publication of document "The social partners' groundwork on innovation: putting the spotlight on EQUAL's achievements" in English and French

3.4. NATIONAL THEMATIC NETWORKS ON AGE MANAGEMENT

3.4.1. Overview of the National Thematic Networks

National Thematic Networks (NTNs) have been the main vehicle for DPs to collaborate and disseminate their work at the national level. They have been set up by the EQUAL Managing Authorities and National Support Structures, and lead/animated in varying degrees by the DPs themselves. In some cases, the NTNs have extended beyond the DP fraternity to include external 'experts', policy figures and other actors who can enhance the capitalisation and dissemination of the EQUAL work at national level.

The NTNs have covered a range of thematic areas, some linked to Adaptability broadly, others focusing on more specific topics. According to the information available, there have been three Round 1 and four Round 2 NTNs focused specifically on age management issues. In addition, there have been four Round 1 and two Round 2 NTNs that have looked at lifelong learning, which one can assume involved issues relating to learning for older workers.

Please note that the Round 2 information in the following table is only indicative. Some NTNs are still being considered and/or taking shape.

Table 3.19 - Summary of the National Thematic Networks[64]

Member State	Round 1	Round 2
Austria	One Adaptability NTN focusing on the "optimisation of supply and demand for further education possibilities"	One Adaptability NTN focuses on competences and on raising awareness amongst SME of the need to increase adaptability
Belgium (FR + DE)	One Adaptability NTN focusing on the "employment of older workers"	The NTN focused on diversity management
Belgium (NL)	No specific NTN on Adaptability, but the adaptability DPs have joined the Entrepreneurship NTN	One NTN developing age management issues and setting up community of practices
Czech Republic	One Adaptability NTN focusing on adaptability as a broad theme	Adaptability and Lifelong learning
Denmark	One Adaptability NTN focusing on "companies and diversity"	No NTN

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[63] http://ec.europa.eu/employment_social/equal/data/document/2006-partsoc-vieact_en.pdf

[64] Please note that not all of the Member States appear in this table as some Member States have not funded activities under the Adaptability pillar of EQUAL

Member State	Round 1	Round 2
Finland	One Adaptability NTN focusing on "supporting firms and their workers in adapting to structural change in the economy, and facilitating the adaptation of IT and other new technology"	No NTN
France	One Adaptability NTN focusing on the "adaptability of individuals and organisations" and older workers	One NTN which aimed at completing a catalogue of products on Adaptability
Germany	Two Adaptability NTNs: one focusing on "older people (45+)", and the other on "lifelong learning" (which in turn set up 2 sub-groups on SMEs and individuals)	One Adaptability NTN focusing on the impact of demographic change for companies; the motivation of older people and finalising the Age Management toolbox developed during Round 1
Greece	One Adaptability NTN focusing on the "validation of skills and competencies"	Two Adaptability NTNs on Age Management and Lifelong Learning
Hungary	No NTN	Promotion of employment
Ireland	One Adaptability NTN focusing on "lifelong learning and inclusive work practices"	No NTN on Adaptability
Italy	The Adaptability NTN did not carry out its planned activities following a ministerial change in 2002	
Luxembourg	No NTN	No NTN
Netherlands	One Adaptability NTN focusing on "the link between education and work, and ICT for disadvantaged groups"	
Poland	No NTN	One NTN on Adaptability
Portugal	One Adaptability NTN which focused on 3 main themes: on-the-job training, lifelong learning and skills certification	Three Adaptability NTN have been set up and focus on CSR, ICT and Organisation
Slovakia	No NTN	One NTN (focus unknown)
Spain	One NTN focusing on "business creation and adaptability" with a specific subgroup on adaptability	Two NTN have been set up. One is focusing on Social Responsibility (human resources management, health and safety, adaptation to change, local government responsibility, etc) and the other one the new forms of work, new Technology, SMEs and older workers.
Sweden	One Adaptability NTN focusing on "the promotion of learning environments and informal learning"	One Adaptability NTN
UKgb	Two Adaptability NTNs: one on "promoting lifelong learning and inclusive work practices" and the other on "supporting the adaptability of firms and employees"	The NTN focuses on adaptability of firms and employees through work life balance and the use of ICT.

Member State	Round 1	Round 2
UKni	No NTN	No NTN

3.4.2. Activities and achievements of the National Thematic Networks

The age management NTNs have been active during both rounds of EQUAL. Presented below are a few examples of some of <u>activities and achievements of these networks</u>[65].

First round

French NTN

The French NTN provided a rich source of information and a communication channel for feeding lessons learnt into policy development on age management. Its activities were wide and varied, including publications, press releases and the Agora event mentioned in 3.2.3. In the words of Laurence Merlin, representing the French Ministry of Employment:

"France made a lot of improvements with regard to understanding and raising awareness of the situation of older workers, through extensive research and reports making recommendations on future policy options. However, it was difficult to see how such recommendations could be put into practice on the ground. The French NTN was a great provider of concrete solutions and practical tools and methods to further realise the policy options and help their evolution".[66]

During the first round of EQUAL The German NTN on older workers addressed issues concerning age management, such as overcoming prejudices, training for older employees and job seekers, motivation and career perspectives for older workers as well as work organisation, work place conditions and ergonomics. It looked at the role of enterprises, employees, trade unions and policy makers in the face of demographic change, and how the experience of older workers could be fully utilised rather than marginalised as part of this change? The network explored and debated the issues and identified practical solutions that could be communicated to policy figures at national level.

Guenter Klassen, an official at the Federal Ministry of Labour and Social Affairs and head of the German network on 'older workers' said that: "the network is proposing solutions and tools to the companies to face the demographic changes and to best use the experience of all workers. German policy sees that there is a real need to change prejudices in companies concerning older employees and to change the attitudes of employees. The network was responding to government policy by giving solutions and tools."[67] The tools are still under development during Round 2.

Second round

Polish NTN

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[65] http://ec.europa.eu/employment_social/equal/data/document/etg3-suc-f-ntn.pdf

[66] Quote published in "Adaptability – Adaptation to Change. Theme 'NTN Success Stories'", Final Report, December 2005, etg3-suc-f-ntn.doc, p. 4.

[67] Quote published in "Adaptability – Adaptation to Change. Theme 'NTN Success Stories'", Final Report, December 2005, etg3-suc-f-ntn.doc, p. 9.

The [Polish network](68) is a discussion forum, a laboratory for innovation and an open space for learning. It is made up of a wide range of representatives, including from Ministries, the EQUAL National Support Structure, Managing Authority and Monitoring Committee, social partners, NGOs, other DPs as well as other EU funded programmes, and a range of experts. While the representatives assist DPs with advice, information about particular tools/solutions and general sharing of experience and know-how, the main role of the network has been to participate in the evaluation of DPs and the assessment of their potential results. According to Piotr Stronkowski, deputy director of the Polish Managing Authority, "what is especially important in this network is that the DPs are developed through continuous dialogue and exchange. If the DPs meet, discuss and work together, then original solutions and results will certainly be created".[69]

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[68] http://ec.europa.eu/employment_social/equal/data/document/etg3-f-ntn-coop-foundation.pdf

[69] Quote published in "A Laboratory of Original and Shared Solutions", p. 2. See following link: http://ec.europa.eu/employment_social/equal/data/document/etg3-f-ntn-coop-foundation.pdf

4. CONCLUSIONS

This paper started by presenting a three-way model to explore the feasibility of establishing a European Age Management Network. It is helpful to return to this model when drawing conclusions on the 'network idea', and in raising ideas and questions that could be discussed in the seminar on the same subject at the Conference 50+ 2007 conference.

4.1. PERSPECTIVE 1: DEMAND

It is clear from the EU policy developments and initiatives outlined in Section 2 that demographic change – and especially the ageing population - is a **'top priority'** for the Community's economic growth and social cohesion. If concrete steps are not taken and/or reinforced by Member States in the short to medium term, the EU is at severe risk of having a reduced working population, which will place huge strains on social security systems, and acutely undermine economic growth and equilibrium between the regions. This priority message is no less explicit than in the Commission Communication "The Demographic future of Europe – from challenge to opportunity."

Echoing this message, both the renewed Lisbon Strategy and underpinning EES outline a range of guidelines and measures to anticipate and deal with demographic ageing. These fall within the three strategic priorities of:

- Attracting and retaining more people into employment, increasing labour supply and modernising social protection systems

- Increasing the adaptability of workers and labour markets

- Investing more in human capital through better education and skills

Moreover, they are coupled with several EU-wide targets to:

- Increase the average employment rate of older workers (55 to 64 year olds) to 50% by 2010

- Increase the average exit age from the labour market by five years by 2010

- Ensure that the average level of lifelong learning participation is 12.5% of the adult working-age population (the 25 to 64 age group)

However, according to recent EU reports, Member States are showing **inadequate and variable progress against these guidelines, measures and targets**. All of the targets are below par. Moreover, the European Commission has indicated a number of areas of concern, including:

- An insufficient lifecycle approach to work

- Slow and disparate progress in promoting 'flexicurity'

- The low participation of older workers in lifelong learning

- The low employment rates of older women

- A general lack of emphasis on the "increasing adaptability of workers and labour markets" strategic priority

From the above information, it is possible to conclude that the challenge of demographic ageing is not only critical to the EU policy agenda at this present time, but also one that requires new, reinforced and/or expedited action at the Community and Member States level. As such, there is a clear opportunity for a European Age Management Network to respond to this agenda by providing ideas, information and collaborative opportunities for better managing age trends and particularly the 'policy challenges' highlighted above. But where specifically could a network help?

In answer to this question, it is clear that demographic ageing impacts on a range of policy domains; indeed, as seen from the Commission Communication "The Demographic future of Europe", a holistic, integrated approach is needed covering employment, pensions and social security, immigration, health, culture, regulatory frameworks etc. However, the network would be best placed focusing on the **employment and labour market aspects of demographic ageing**, whilst allowing room to interface with other policy areas. The reasoning behind this is that it provides the closest fit with EQUAL, as an innovative employment programme, as well as other interested parties attending the Conference 50+ 2007 conference. Moreover, the EES and ESF provide two EU frameworks – the one policy-related, the other financial – to help define and steer the 'topical issues' that the network could focus on. By way of illustration, any of the 'policy challenges' listed above, such as the lifecycle approach to work or the low employment rate of older women, could be used as themes to 'kick-start' the network.

It is also advisable for the network to focus on **demographic ageing – and thereby age management - at all three levels and across all (working) ages.** The EU policy agenda clearly places emphasis on a holistic approach, whereby ageing needs to be managed (and anticipated) at the individual, enterprise *and* labour market levels. Moreover, age management is not just about older people – at whatever age threshold you might define this – but also about people being active and supported throughout their working lives, capitalising in particular on the potential of young labour market entrants.

Aside from existing 'EU policy challenges', what types of policy maker and practitioner might be interested in the activities and outcomes of the network? Given the network's proposed employment focus, **DG Employment, Social Affairs and Equal Opportunities** would be a primary audience, as would the European and national actors involved in the DG's European Employment Observatory and Mutual Learning Programme. It is also worth considering other DGs, particularly:

- **DG Education and Culture** - given their responsibility for lifelong learning policy and programmes

- **DG Justice and Home Affairs** - given the explicit links made between immigration and ageing in the Commission Communication "The Demographic future of Europe"

- **DG Regional Policy** – bearing in mind the anticipated impact on regions (in employment and social terms) of demographic ageing

At the Member State level, **national and regional (and potentially local) government representatives** are also an important audience insofar as they are required to implement the EES guidelines, and as indicated above, are experiencing patchy progress against particular guidelines and associated targets. A network could help to share innovations, good practice and information between the Member States as a means of improving overall performance against the age-related aspects of the EES. The network could also be beneficial in terms of the Member States' implementation of the ESF. Indeed, the Member States are currently preparing and rolling out their Operational Programmes for the ESF under the new funding period (2007-2013). This presents the network with a prime opportunity to inform and assist the early stages of ESF implementation in terms of the age management projects that could be designed and funded over the next six years.

European and national social partners are also a primary audience. Although the position of the social partners has not been presented in this paper, the role played by employer and workers' representatives in relation to age management is an important one. Moreover, the Lisbon Strategy, EES and ESF all see the social partners as a key stakeholder in the effective design and implementation of employment measures, including those driven by an ageing workforce.

There is also potential interest in the network activities at the **practitioner** level. Training and guidance bodies, academic institutions, non-governmental/community organisations, to name but a few, are all implicated in varying degrees in the EU policy measures related to age management. As such, they could find the network useful in terms of sharing, assessing and potentially disseminating on-the-ground experience - even more so if the network was populated and/or drew on the experience of 'like-minded' EQUAL project practitioners.

It is also worth considering if and how the network could respond to the needs of individual employers, both large and small. **Employers** are undoubtedly an essential part of the 'age management equation' as far as EU policy is concerned. Changing attitudes, making workplaces more adaptable and responsive to an ageing workforce and dealing with new regulations frameworks based on 'flexicurity' principles are some of the issues that companies are increasingly having to deal with. However, even if companies were interested in the 'solutions' that the network could provide in relation to these and other challenges, it is unclear to what extent they would be able to actively participate. Based on EQUAL experience, commercial pressures mean that companies – especially SMEs – have limited time to engage in network activities unless they have a direct business benefit. It is therefore suggested that the question of employer interest and involvement is a point for discussion beyond this paper.

4.2. PERSPECTIVE 2: SUPPLY

Section 3 clearly demonstrates that the EQUAL programme provides a **rich source of project activities and outcomes** in relation to age management. No fewer than **210 EQUAL DPs** are estimated to be addressing the needs of older workers and/or issues related to demographic ageing in an employment context. Moreover, the numbers and proportion of 'age management DPs' has grown during the second round of EQUAL funding, not only in the Adaptability pillar, but across all of the thematic fields. This means that 144 DPs are currently active (compared with 66 DPs in the first round). So if one takes account of the individual partner organisations that are involved in each DP, this undoubtedly represents a significant community of EQUAL actors to help initiate and populate a European Age Management Network.

It is particularly encouraging to note the **thematic relevance** of the EQUAL DPs in relation to the EU policy agenda. The age management DPs are well represented in relation to lifelong learning and adaptation to change issues (thematic fields 3E and 3F), amounting to 85 DPs in total. The DP activities are highly pertinent to the EES strategic priorities on "increasing the adaptability of workers and labour markets" and "investing more in human capital through better education and skills", as well as the specific EES Guidelines 17, 18 and 23. Moreover, their activities relate to areas where Member State progress is reported to be disparate and/or inadequate – for example, the concerns over the low participation of older workers in lifelong learning and insufficient improvements of the adaptability of workers (including older workers) and enterprises. Older women are also the second highest target group (for the second round DPs), which is another area of EU policy concern.

There is also a significant number of EQUAL DPs addressing age management from the point of view of employment access and (re)integration into the labour market (under the thematic fields 1A and 1B): 76 overall. This falls within the EES strategic priority concerned with "attracting and retaining more people into employment, increasing labour supply and modernising social protection systems" and more links specifically (but not exclusively) with the EES Guideline Nos. 17 and 18, and the 50% employment target for older workers.

EQUAL's thematic relevance is heightened - in a very tangible way - by the work that was undertaken by the EQUAL Adaptability DPs under the first round. As explained in Section 3.2, the first round DPs and their Member State representatives collaborated via a European working group and other activities under the headings of "A lifecycle approach to working life" and "Crossing the generations" (on intergenerational learning). As mentioned above, the former in particular is an area where the EU is placing particular emphasis. Thanks to the European thematic work in the first round, the network could draw on an **existing set of materials, products and information.** This includes policy briefs[70], publications from the Agora conference, DP 'success stories' and the "EQUAL@Work" brochure.

The second round provides an opportunity to **capitalise on the thematic relevance of EQUAL even further.** As presented in Section 3.3, 55 age management DPs are currently active in the Adaptability pillar. Whilst there have not yet been any European thematic activities to coordinate and examine in great detail the work of these DPs (as there was in the first round), these activities could be undertaken in the future. Indeed, maybe the European Age Management network could act as a platform or impetus for such activities to happen (within or outside the scope of EQUAL funding). The EQUAL NTNs should also not be neglected in this regard. They help by having already coordinated the age management DPs at the national level and therefore provide a good starting point for EU-wide networking.

It is useful to point out that, based on the second-round analysis, the Adaptability DPs are clearly able to contribute to **all three levels of the EU age management agenda**: individual, enterprise and labour market. They are also in an advantageous position in terms of offering insights about age management from a regional and sectoral perspective, and most significantly within SMEs. In terms of the target groups, their activities are not only benefiting older workers directly, but also other actors such as line and human resource managers within companies, social partner representatives and public employment services. So, overall the DPs are able to offer **varied and multi-dimensional insights** into addressing age management challenges on the ground.

It is fair to say that the age management DPs in the second round of the Adaptability pillar are **not able to provide full geographical coverage.** Most of the age management DPs are found in France, Germany, the UK and Italy, with no or relatively low representation (below five DPs) in 13 Member States. However, there may be more DPs in the under-represented Member States under the other thematic fields. In addition, if the network was aiming for fuller EU (or even wider European) representation, then there would always be scope to call on inputs from outside of the EQUAL community. In fact, bringing EQUAL and non-EQUAL actors together within a network would be advantageous – not only because of the fact that EQUAL soon comes to an end, but also because of the opportunities to compare, contrast and learn from age management interventions in different contexts and settings.

As a source for the network, EQUAL has a particular asset insofar as it finances innovative, transnational and partnership-based projects. It can therefore add value to network activities by offering **new age management solutions** that have already been developed and tested by a **range of stakeholders** (public authorities, employers, social partners, training providers) and via **transnational collaboration**. Such solutions will undoubtedly be of interest to actors and organisations seeking to address the 'policy challenges' mentioned in Section 4.1. Moreover, EQUAL provides a **'bridge' for the actors/organisations seeking to address these challenges within the context of the new ESF**. Under the new ESF Regulation, ESF programme and project managers will be expected to adopt (in varying degrees) the 'EQUAL principles' of partnership, transnationality and innovation. Therefore, they can draw on the experience of EQUAL DPs in determining how best to implement age management measures involving a range of partners, crossing national boundaries and/or experimenting with new ideas and approaches.

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[70] The EQUAL Unit at DG Employment, Social Affairs and Equal Opportunities is currently reviewing and updating the policy briefs.

Aside from EQUAL, this paper has revealed a number of **other potential contributors** to the network. Firstly, all of audiences mentioned in Section 4.1 should be considered as potential contributors to, as well 'beneficiaries' of the network. Secondly, there are other projects and programmes operating in the field of age management, such as the ESF Article 6 Innovative Measures, the Mutual Learning Programme, the Gruntvig, Leonardo and Erasmus programmes, the ERA-AGE project, and the European Foundation's Working Conditions Observatory. And thirdly, there are existing networks that address ageing issues that could provide useful information, inputs and contacts in the age management field.

4.3. PERSPECTIVE 3: STRATEGIC AND OPERATIONAL ASPECTS

In answer to the question headlining this paper, there are good indications that a European Age Management Network provides a way forward. On the supply side, managing the challenge of demographic ageing is high on the EU policy agenda, with clear challenges and priorities in a number of areas. On the demand side, the EQUAL DPs provide a significant source of ideas and actions in the age management field, focusing on many of the EU challenges and priorities identified. From both sides, there are a range of organisations and individuals who could potentially benefit from and/or contribute to the network. However, the main caveat to this positive statement is that the success or failure of a European Age Management Network very much depends on the strategic and operational details. If the network does not have clear objectives, is not adequately resourced and managed, or does not actively engage its members – to name some of the many challenges! – then the network is bound to failure even if the supply and demand conditions are deemed favourable.

This paper was not intended to explore the strategic and operational aspects of the network in detail. It can however outline the main aspects that would need to be discussed and agreed upon by those people/organisations interested in setting up the network. These are the network's:

- Name!

- Aims and objectives – ideally set out in an agreed and signed 'Network Declaration' (see below)

- Thematic focus – in other words, the particular aspects and issues of age management that the network will focus on

- Activities – including website animation, events, peer reviews, publications, discussion groups, helpdesk, regional or sectoral clustering etc.

- Management and resourcing – covering management structures, key staff and logistical issues

- Financing – whether this comes from, for example, EU funding, membership fee, employer sponsorship and/or other sources

- Membership – including the type and geographical scope of the organisations or individuals involved, as well as the type(s), expectations and requirements of membership

In considering these aspects, it is worth reviewing the existing networks identified in Section 2.5. The main observation from this review is that the European Age Management Network could be highly distinctive from other networks by operating in a number of ways. Firstly, as suggested in Section 4.1, it would have a clear employment and labour market focus, rather than addressing all areas of ageing. Secondly, unlike many of the existing networks, it would not be representing and advocating in the interests of older people; it would provide an unbiased platform for actors in the field of age management to communicate and collaborate at the European level. Thirdly and linked to the previous point, it would be open to a range of organisations (exact types to be determined), not just regional authorities or NGOs for older people. And finally, it would have a

strong, ideally full representation of the EU Member States, with or without the option of involving other non-EU countries.

Whilst the European Age Management Network would want to carve out a profile and role of its own, there are clear advantages in making links with the existing networks - particularly AGE and FIPA given their direct links with the European Commission

To conclude this paper, it is worth setting out a number of 'next steps', namely to.

- Establish a working group of people/organisations who are interested and willing to help develop the 'network idea'.

- Discuss and review in detail the contents of this paper, identifying areas that need further exploration and/or clarification

- Discuss and agree upon the strategic and operational aspects of the network, as listed above

- Draw up a 'Network Declaration' and 'Action Plan' setting out the strategic and operational aspects of the network

- Draw up a mailing list of people/organisations who wish to be kept updated about the network developments and could at a later stage become network contributors/members

- As a priority issue, identify the means of financing the network

It is hoped that these steps will be discussed and taken forward during the Competence 50+.