

Active Strategies for an Ageing Workforce

Conference Report
Turku, 12-13 August 1999



EUROPEAN FOUNDATION
for the Improvement of Living and Working Conditions

Active Strategies for an Ageing Workforce

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Preface

Public policies and workplace practices have begun to change, towards improving employment prospects and participation rates of the ageing workforce. This rethinking towards more active strategies reflects an increasing awareness of trends in demography, labour force participation and changing market needs. The failure to combat age barriers, which appears to be widespread after age 40-50, means the wasting of human resources. The costs of this failure are borne not only by older workers, but by their employers, and is manifest in public expenditures on social protection, unemployment and health.

This re-orientation to promote the retention, retraining and reintegration of older workers demands a fundamental change in the climate of public policies, in the culture of work organisation and in general attitudes, including those of older workers themselves. Prevention, not only corrective measures, should be the priority for the future, whereby the whole of working life, not only later years, is taken into consideration.

The Turku Conference (12-13 August 1999) examined the development, implementation and assessment of 'active strategies' – the policies and practices in favour of the participation in employment and productivity of the ageing workforce. It also looked at the development of more integrated public policies for an ageing workforce, involving the employment, education, social and health sectors operating in a coordinated way; it sought to evaluate the success of these initiatives towards a more integrated approach, and to determine what lessons have been learnt.

We hope that this conference report offers a timely contribution to the debate about ageing and employment. As the EU Employment Guidelines emphasise, action is needed at all levels and by all the actors involved to promote opportunities for the ageing workforce. A new coalition and

consensus must be established urgently, to reverse the trend towards the exit and exclusion of workers. This will involve not only the re-thinking of tax and benefit systems, but also the coordination of local services and also the creation of more options for training, flexible working and promotion of the working capacity of the ageing workforce.

The conference results present lessons from the Member States which we hope can be incorporated into new policy approaches that will stimulate the development and evaluation of the necessary measures.

We would like to thank the participants for their contributions, our own colleagues for their support, and the rapporteur for his energy and commitment in the preparation of this report.

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Chapter 1

Introduction

The Turku Conference examined the development, implementation and assessment of active measures and integrated strategies in favour of the participation, performance and productivity of the ageing workforce. The European Employment Guidelines call for preventive and active approaches in order to meet the challenge of a changing economy and labour market. This involves considerations of tax and benefit systems, but also of working time and work organization as well as education and training, equal opportunities and workers' health. The emphasis in the Guidelines upon prevention and incentives in social protection underlines an orientation to retain and reintegrate older workers in the active labour force.

The conference went beyond documentation of active measures to consider their effectiveness and the need for co-ordinated application. This need for co-ordinated or integrated policies and practices draws attention to the role and responsibilities of the different parties involved, which was a constant theme in the conference.

Spirit and commitment of the Turku Conference

The Turku Conference was jointly organised by the Ministry of Social Affairs and Health, the Ministry of Labour, the Ministry of Education, the Social Insurance Institution and the Central Pension Security Institute of Finland in co-operation with the European Foundation for the Improvement of Living and Working Conditions. There were more than 130 participants from both the EU-policy level and EU Member States representing the wide range of societal groups involved in the issue of an ageing workforce: policy makers, government officials, representatives of employer and trade union organizations, NGO representatives and researchers (see Annex 2: list of participants).

This report is based on the presentations, plenary debates and working groups in the conference. The background papers looked at data on different aspects of ageing and employment; the evaluation of initiatives recently introduced in some EU Member States; analyses of new policies to promote opportunities for an ageing workforce developed in some European Member States; and results of applied research in the field of industrial gerontology, further education and other disciplines.

The conference structure (see Annex 1: Conference Programme) was built around important starting points for active and integrated approaches which reflect the priorities of the European Employment Guidelines (see next section). Specifically, this refers to ‘active welfare and labour market policies for (re)integration into employment’, ‘reorganization of work and working time’ and ‘maintenance of the employability of older workers’ – which can be regarded as key dimensions of active strategies for an ageing workforce.

As a whole, the Turku Conference was embedded in the conviction that the hitherto prevalent practice of excluding older workers should be translated into positive strategies for management of an ageing workforce.

It was political will that helped bring early exit schemes into force and there was widespread acceptance in both the political and economic systems. Now it is the task of policy makers in government, among the social partners and in non-governmental organizations to reverse this trend. Incentives are needed to encourage people to remain in the active workforce on both a voluntary and a productive basis. A more inclusive culture of opportunities for an ageing workforce has to be developed. In consequence, the conference underlined the need for a profound change in attitudes (widespread and hard to overcome) of policy makers, social partners, key persons in companies and, last but not least, of older workers themselves.

The conference conclusions and recommendations – the ‘Turku message’ – aim to inform public policy and enterprise development regarding the necessity of a ‘dual strategy’ of practising both active and integrated policies and – in doing this – of fighting against age discrimination in the labour market. The prime target groups of the conference results, therefore, are in the first place, decision makers: politicians, government officials, representatives of the social partners; but also personnel managers and representatives of works councils, particularly in small and medium size companies, as well as other groups and individuals with an interest in the issues of an ageing workforce.

It was no coincidence that the conference took place in Turku, Finland. Apart from the Finnish Presidency of the European Council, the choice also mirrors the significance of the Finnish National Programme for Ageing Workers (1998 – 2002). This programme can inform current discussion about translating the European Employment Guidelines into policy and enterprise practice (see next section). In Oulu, Finland, in the month before this conference, an informal meeting of Social Affairs Ministers from across the EU had affirmed the need for new thinking and action to improve the employment prospects of the ageing workforce.



European action on workforce ageing

The impact of workforce ageing on employment and the labour market is an increasingly important theme in Europe's employment strategy. In most EU Member States, job markets are currently characterized by two distinctive age-related features (see also OECD 1998):

- Demographic forecasts emphasize that the next 20 years will see both a relative decline in the population of working age and significant ageing of the workforce. There is general agreement that this 'greying of the workforce' urgently demands an active and multi-faceted response in both public and enterprise policies.
- In almost all Member States older workers are confronted with clear disadvantages in both labour markets and in enterprises. People over 50 are very often regarded as nearing the end of their working lives. At the same time there is a widespread awareness of the problems and inconsistencies of early exit which, at least at European policy level, have resulted in recommendations to reduce early exit and to prolong working life. However, it remains an open question how quickly this problem can be solved and how to deal with the different wishes and needs of the generations concerned (Commission 1999c).

Both trends require more active and integrated strategies to cope successfully with the challenges for both economy and society on the one hand and for the ageing individual on the other. Fundamental changes are needed in the climate of public policies, the culture of work organization and also in the attitudes of the ageing workforce. Decisions about reform measures should be based on sound data and appropriate evaluation of initiatives; an assessment of the adequacy of this information was one of the objectives of the Turku Conference.

Since 1994 the ageing of Europe's workforce has been on the agenda of EU policy. The 1994 Essen Summit was the first to underline the necessity to improve employment opportunities specifically for older workers. The conclusions of both the Cardiff (June 1998) and the Vienna (December 1998) European Councils emphasise the need to pay special attention to older workers as part of the priority to develop a skilled and adaptable workforce. They also underline the importance of tackling discrimination in the labour market and of creating employment opportunities for older workers.

Attention to the ageing workforce was reinforced by the conclusions of the Informal Council of Ministers of Labour and Social Affairs in Oulu (July 1999). This meeting emphasised that the problems linked to ageing must be identified, and measures must be taken to facilitate longer participation in working life by older workers. Working conditions should be adapted and organised to take account of ageing workers, and efforts should be made to facilitate their coping with work. Early pension schemes should not be too attractive, either for employers or for employees. The prerequisite for a higher employment rate of ageing workers lies in their employability.

Both the 1999 and draft 2000 European Employment Guidelines (Commission 1999a, 1999b) call upon the Member States to intensify their efforts in supporting and encouraging older workers to participate actively and fully in working life. A 'preventive approach' lies at the heart of the strategy. Based on the four-pillar structure of the Guidelines – Employability (see Chapter 6, section on the employability of older workers), Entrepreneurship, Adaptability and Equal Opportunities – the following proposals for national policy approaches which are of particular significance for older workers have been emphasised.

Transition from passive to active measures

There is a need for 'a transition from passive to active measures', for a 'review and reform of benefit, tax and training systems to make it more attractive to take up work or training opportunities'. The Member States will 'endeavour to increase significantly the numbers of persons benefiting from active measures to improve their employability... A reassessment of measures such as early exit schemes, which induce workers to leave the labour force early, is called for'.

Lifelong learning

'The importance of lifelong learning in the development of a skilled and adaptable workforce is underlined... Member States should set themselves targets to increase the numbers benefiting from such means; easy access for older workers will be particularly important'.

Promoting a labour market open to all

Certain groups and individuals 'experience particular difficulties in acquiring relevant skills and in gaining access to, and remaining in, the labour market. A coherent set of policies promoting the integration of such groups and individuals into the world of work and combating discrimination is called for'. Member States should 'develop appropriate forms of preventive and active policies'.

Modernizing work organization

The social partners are 'invited to negotiate at all appropriate levels agreements to modernize the organization of work, including flexible working agreements, ... achieving the required balance between flexibility and security. Such agreements may, for example, cover the expression of working time as an annual figure, the reduction of working hours, ... the development of part-time working, lifelong learning and career breaks'.

Reconciling work and family life

More attention needs to be paid to the importance of 'family friendly policies including affordable, accessible high-quality care services for children and other dependants, as well as parental or other leave schemes'. In order to promote 'the reconciliation of career and family responsibility. ... Policies on career breaks ... and part-time work, as well as flexible working time, are of particular importance'.



The draft guidelines for 2000, under the pillar of improving employability, require Member States ‘to develop a policy for active ageing, encompassing appropriate measures such as maintaining working capacity, lifelong learning and other flexible working arrangements, so that older workers are also able to remain and participate actively in working life’ (guideline 4). Although, the 1999 and proposed 2000 European Employment Guidelines are not intended explicitly for an ageing workforce, they include a range of concrete starting points for active strategies, including enterprise approaches. At the workplace level the concept of ‘age management’ is often used: ‘The term “age management” may refer specifically to the various dimensions by which human resources are managed within organizations but, also, more generally, to the overall management of ageing workforces’ (Walker, in conference material)¹.

¹ For information on how to obtain the conference material, see References (p.43).



Chapter 2

The Framework Conditions: Context and Changes

The ‘greying’ of the workforce

All European countries are faced with the same well-known demographic phenomenon – the ageing of the population and of the workforce (see European Commission, 1998; OECD 1998). In all countries birth rates have fallen and people are living longer, raising the average age of the population in both the community and the workplace. The relative proportion of ageing workers (50 – 64 years) in the entire workforce will steadily increase in the next 15 years in the European Union: between 1995 and 2015, the numbers aged 50 to 64 are expected to grow by more than a quarter, whereas over the same period the numbers in the 20 to 29 year old age group will drop by as much as 20 per cent. The ‘greying’ of the workforce affects Germany, Finland, Belgium, Italy, the Netherlands and Austria above the average. In these countries in 2015 more than 30 % of the workforce will be aged 50 and older. Europe’s ability to compete will be highly dependent on the employability of this ageing workforce.

The employment rates of older workers in the EU have declined dramatically, although they are still high in some countries like Sweden, Denmark and the United Kingdom (Commission 1999d). It seems paradoxical that the average duration of working life has fallen by approximately five years in the last twenty years in Europe while life expectancy has risen. Nowadays, in some European countries like Germany, more of the whole human life course is spent outside than inside paid employment; the redistribution of working time over the life course has become a policy issue (see Chapter 6, section on ‘Reorganization of work and working time’).

Early exit schemes in Europe

Early exit schemes (like pre-retirement in Denmark and Germany, disability compensation in the Netherlands, Job Release Schemes in the UK) have developed extensively over the last 20 years. In most European countries, early exit was regarded as a tool to fight unemployment, particularly youth unemployment; early exit schemes were usually the result of a tacit agreement between the state, employers and the unions. In many cases they were also highly appreciated by the older workers themselves – given acceptable financial conditions. In the majority of Member States, initiatives to curtail or to restrict access to early exit schemes and programmes have been implemented recently, e.g. in Austria, Belgium, Denmark, Finland (see chapter 5), France, Germany, Italy, the Netherlands, the UK and Sweden.

Why early exit policies need to be overcome

The following reasons for generally advocating an end to early exit – at least in a medium term perspective – can be advanced:

Structural changes in the working life course

There is an ‘age/employment paradox that is the spur to action: while life expectancy has increased by around ten years since the 1950s, labour force participation of older male workers (60-64) has dropped from close to 80% to approximately 30%’ (Walker in conference material). Moreover, health status has improved and this trend is likely to continue in the future.

Pressure on public sector funding

All EU Member States are seeking to improve control of social security costs associated with early exit on the one hand (in particular disability payments and early old age pensions) and the rising number of elderly people who are dependent on social welfare provisions on the other. Currently, for every older person there are about three younger people in employment and this ratio will be maintained for another decade. After 2010, the trend changes sharply and by 2030 it is estimated that there will be only two employees for every older person. This indicates that, during the period from about 2010 to 2030, there will be relatively fewer people producing the goods and services we all consume; and there will be relatively fewer tax payers and relatively more people in receipt of public benefits.

Foreseeable labour and skill shortages

Demographic forecasts uniformly suggest a growing labour and skill shortage. From 2010-2015 onwards, at the latest, older workers will be needed to fill manpower gaps, while skilled workers will be in demand to meet growing competition and rapidly changing technology and organizational structures. While a skilled older workforce will be essential, German research shows that a strategic change in enterprise personnel policy – overcoming youth-centred policies and planning for an ageing workforce – on average takes ten years to realise in practice. However, across Europe few companies seem to be prepared for this re-orientation and therefore may need direction and support from public policies.



Unintended consequences and inconsistencies

Over the last 20 years, early exit has led to a series of unintended consequences and inconsistencies. Among others, the following negative effects for both the employees and the companies are usually mentioned.

From the worker's perspective:

- Pressures to exit early even if desire to work longer; in many cases income and pension losses; lowered in-company age limits affect employer's perceptions of the age at which workers may be considered to be 'too old' with disadvantages for both older workers still in work (e.g. exclusion from training, reduced promotion prospects, restricted work mobility, decline in motivation) and older job seekers (e.g. restricted chances for reintegration, lower recruitment ages); increase in work loads, in physical strain and stress for those of all age groups who remain; an overall 'anti-age climate' with negative implications for future cohorts of older workers.

From a company perspective:

- Premature loss of skills and know-how which cannot be replaced adequately; loss of in-company experience; loss of a company's social status; economic consequences, e.g. increase in indirect labour costs due to an increase in the contributions to the social security system – this particularly affects small and medium-sized companies.

No biological reason for early exit

There is some evidence from research that older workers are, on average, just as productive as younger people. However, this depends upon working conditions, workloads and physical and mental job demands being compatible with the changes in work capacity and individual efficiency which take place over the life course. There is no biological basis for a formal retirement age in the early 60s or even earlier.

The 'dual face' of work

In all discussions about the ageing workforce and early exit there is an implicit core assumption that employment is the most meaningful activity for both the individual and the society. However this conceptualization does not take into account the 'dual face of work'. 'On the one hand being employed might be a pre-condition for relevant social processes, such as: structuring of time, building up networks, earning an income, possibility of individual development, acquiring status or obtaining social security entitlements. On the other hand being employed can also mean high health-threatening risks - both physical and mental, stressful, dull and repetitive work; declining career perspective or threat of unemployment. Being in paid work may even mean exclusion from 'normal social life' (e.g. as a result of shift work)' (de Vroom in conference material). The deleterious effects of employment are one reason why, particularly for older workers, both normal and early exit routes have been developed to 'escape' from work or bad working conditions.

There is some evidence that the quality of working life, at least for certain groups of ageing workers, has been decreasing. Apart from age discrimination (Walker 1997), it has become evident that in many cases working conditions do not allow for the changing capacities and psychological needs of ageing workers. This is partly due to the introduction of new forms of work organization and production in the 1980s and 90s, which have resulted in both greater work pressures and a higher risk of dismissal or involuntary early exit. In consequence, the use of early exit schemes may be interpreted as a 'forced flight from work' (Kuhn in conference material), often to prevent unemployment.

A second argument for the option of early exit is related to the overall labour market. Although only about one third of workers are replaced, early exit continues to be regarded as a tool to fight unemployment. This particularly concerns youth unemployment, which is still prevalent in the southern European countries. Therefore, cessation of early exit might be interpreted as an offence against the principle of intergenerational solidarity.

The 'dual face' of retirement policy in Europe

'The retirement decision is greatly influenced by institutional arrangements in the labour market and by large (and often unintended) incentives to early exit that are found in public policies such as pensions, disability insurance or unemployment benefits. These incentives are often deeply entrenched and supported, directly or indirectly, by a range of existing public policies. It therefore seems reasonable to conclude that a major reform of public policies, sustained over a long period, is essential' (Hicks in conference material)

Both 'push- and pull-factors' arising from the working conditions and the labour market on the one hand and from public welfare incentives and corporate policies on the other, have resulted in a widespread 'early exit mentality'. Nowadays, early exit has quite often become part of the worker's 'normal biography'. In many cases, expectations of early exit determine the lifeplan and strategic choices of employees, at least of certain cohorts. In this respect, in some countries, early exit is regarded as a 'cultural good' worth preserving.

The rethinking of early exit in the second half of the 1990s reflects economic pressures on public welfare budgets, but also the labour market situation and prospects. However, corresponding strategic changes in enterprise policies are not in sight, at least not on a wide scale.

It seems likely that simply breaking down pathways into early exit without creating incentives for a fundamental change in the hitherto prevalent age-related personnel policies will create new social problems. A much closer and coherent relationship is needed between labour market and welfare state regulations on the one hand and effective incentives for a strategic change in the enterprise internal labour market policy, which is more age-integrated and less age-discriminatory, on the other. Obviously with such a goal an integrated, or at least co-ordinated, multi-level approach is necessary. One vital precondition for this ambitious task is to change attitudes within all groups involved, but also to consider the wishes and attitudes of the workers concerned.



Chapter 3

‘Active’ Strategies to Promote Opportunities for an Ageing Workforce

‘Active’ strategies usually refer to active labour-market measures aimed at both prevention of unemployment and (re)integration of unemployed workers. They are embedded in the overall concept of promoting employability. According to the 1999 European Employment Guidelines, employability means ‘a new active labour market policy to prevent unemployment and long-term unemployment; this means a preventive strategy, the objective of which is to reverse the trend of long-term unemployment. More resources should be allocated to prevention and activation. Early identification of individual needs and tailor-made responses are essential and active employment measures, rather than passive support measures, should become the rule’ (Commission 1999a).

In relation to older workers, active public policies ‘are required to tackle age discrimination and ensure that older workers have a fair access to the jobs that are available’ (Walker in conference material). The recommendations of the 1998 Vienna Council include active measures for the (re)integration of older workers:

- combat age barriers in employment;
- increase efforts to adapt professional training and;
- increase efforts to adapt and improve working conditions.

The conference contributions emphasised that active strategies should at the same time be preventive measures. They are primarily geared to the company level, but in part also to the local level and local services. The overall goal is to support staying in the active workforce and to prevent involuntary early exit. In doing this, attention to the specific needs of different target

groups is vital, as is commitment from the workers themselves. Active measures of this kind could include:

- lifelong learning, e.g. educational programmes, training courses and grants;
- working time adjustment;
- career planning and guidance (including continuing vocational training);
- job (re)design (including adaptation of work environment);
- health protection and healthy age management (including health services);
- vocational and medical rehabilitation;
- preparation for a second or third career (e.g. as a voluntary worker in social services);
- information campaigns including dissemination of good practices;
- age-awareness publicity campaigns on different levels (companies, social partners);
- subsidies and allowances, benefits and insurances;
- anti-discrimination legislation;
- local level activities to support measures of this kind (e.g. local services to support training activities).

Although some of these measures may seem ‘age-specific’, they are significant tools to improve working conditions and employment prospects in general. Most of the initiatives are ‘age-neutral’ and follow the formula ‘What is good for younger and middle-aged workers is also good for older workers – and the other way round’ (for details see also chapter 4). Some age-specific measures may be necessary, e.g. for older handicapped workers. However, research shows that the typical ‘employment problems’ of older workers derive, for example, from declining work flexibility, skill deficits or restricted health status: these do not arise suddenly and unexpectedly at the later stages of an individual’s working life but follow ‘careers’ with their original starting points already in earlier stages of life. Translating the concept of ‘age neutrality’ into practice means a complete re-thinking of prevailing age-related policies, which are triggered only when performance or employment problems of older workers become evident.

Active strategies should be considered in the context of the prevailing social security system. Some features which were originally designed in favour of an ageing workforce might, under certain circumstances, lead to ambivalences or even function as disincentives. This particularly affects public policy incentives (e.g. gradual retirement schemes which may, in practice, promote early exit or serve as a privilege for white collar workers; higher social security contributions for older workers might affect recruitment chances negatively). Reconsidering social protection might also result in some loss of social protection and thus create new social injustices. Therefore cautious examination and weighing of social security features for an ageing workforce are necessary in order not to undermine the objectives of active approaches.



Chapter 4

What is Meant by 'Integrated Policies'?

In his keynote lecture, Alan Walker outlines an 'integrated age management strategy' as follows: 'While age management, first and foremost, is a matter for organizations, public and private, it cannot be left solely to employers Age management is a preventive strategy that must be broad based'. From the conference discussions and conclusions the following possible dimensions of 'integrated' policy approaches can be distilled.

Co-ordination of different types of policies

This dimension refers to the drawing together of different policies in order to meet one paramount goal such as maintaining or even raising the workability of the workforce. For example, the employment prospects of older unemployed workers can generally only be raised by common endeavours of both labour market and economic policy. Fighting early exit, to give a different example, requires a multi-level approach of reducing public welfare incentives and the promotion of active labour market policies that aim for (re)integration, in-company age-management strategies and supportive services on a local basis. For in-company measures, harmonization of certain types of active strategies could be considered, e.g. measures of working time organization to be used as tools for enabling vocational training, or linking health promotion with career planning. The Finnish concept of maintaining and promoting workability (see chapters 5 and 6) is primarily based on this idea.

Tailor-made strategies

Integration can apply to tailor-made approaches on an individual basis, for example, in designing strategies for career planning. This particularly concerns an ageing workforce at specific times in their professional career when supportive measures are necessary. It might also concern older workers with specific needs such as: older long-term unemployed; ill workers or older workers

who have lost vocational skills; older workers in the process of rehabilitation; workers in jobs with restricted periods of employment; or workers preparing themselves for a second or even third career, for example planning to work in the voluntary sector once retired. It is vital that some kind of 'systematic assessment' is made, as used in some EU Member States when trying to re-integrate older long-term unemployed, followed up by counselling and guidance.

Interrelations between different policy approaches

When linking different policies, both the workplace and labour market levels should be considered systematically in order to prevent unintended or even negative effects. The complex interrelationships between welfare policies and labour market policies on a national level have already been underlined. Financial support to workers with care responsibilities might result in a decision to leave the workplace for a certain period, either partially or completely. While this might be helpful in the short-term, it could be counterproductive in the longer term because reintegration following the care break may be poor. Similar discrepancies can occur when developing in-company approaches. For example, designing in-company further training for ageing workers should be followed by opportunities to apply the new vocational skills in order to avoid demotivation.

Joint responsibility of all partners involved

This dimension of integrated policy approaches refers to a joint responsibility of key actors and is true for both public policy approaches and initiatives on the enterprise level. This idea is reflected both in the ideals of the Finnish Programme for an Ageing Workforce and in the underlying philosophy of the 'vision on senior issues', as presented by the Dutch Ministry of Social Affairs and Employment. This explicitly demands that 'all parties involved, government, social partners and the older employees (proper) must commit themselves to reversal of the perceived trend of the poor level of labour participation by seniors' (Scheele in conference material). Joint action is, of course, not only at the level of public policy. Most of the enterprise examples of good practice, as described in the final report on 'Combating Age Barriers in Employment', have their origin in actions of this kind and are based on a co-operation of personnel managers, line managers, works councils and the older workers themselves when designing in-company age-management approaches (Walker 1997). Of course, the benefits of joint action and necessary incentives should be clearly identifiable for the different parties involved.

Cross-group policies versus older workers' policies

This dimension refers both to the fact that explicit 'older workers' interventions per se will play a minor role in a strategy for an ageing workforce and to the need to replace age-specific by age-neutral policy approaches. What is needed is a dual strategy: 'There is no theoretical conflict, of course, in saying that the manifestations of a problem are most evident among older workers, but that the solution lies mainly with reforms that impact on all workers, especially younger workers. This is a normal balancing of preventive and remedial approaches' (Hicks in conference material). The focus of an 'integrated age management strategy shall be on the whole working life and not



only on its later part with the aim of neutralizing the negative impact of ageing on employment' (Walker in conference material).

Holistic approach

To design integrated policy approaches, it is also necessary to systematically consider the interrelations between the world of work and private life, not only for older workers. Workers are involved in manifold private relations and social networks which very often interlink with their professional life. Approaches which target only the professional aspect of the worker's life might fail to meet the real determinants of employment problems. For example, more and more older female workers are engaged in eldercare obligations. Policy approaches to improve their employment conditions therefore have to address not only work-related issues but also private needs and constraints in the context of reconciling work and care.



Chapter 5

The Finnish Programme for Ageing Workers (1998–2002)

One of the more integrated policy programmes in Europe, which was presented in Turku by P. Sorsa, is the Finnish Programme for Ageing Workers (1998-2002). This programme is based on the recommendations of a governmental committee and addresses the challenges that the ageing of the workforce will inevitably pose. The aim, and achievement of the programme so far, has been to build a wide consensus at the policy level, both to value the experience of the ageing workforce and to raise the real age of retirement. The slogan of the programme 'Experience is national capital' emphasises the ageing workforce as a resource. An active strategy for ageing workers could also be focussed upon ageing as a problem in working life. However, Finnish experience shows that this is not a sustainable base for the development of a wide consensus that could reverse the trend to the exit and exclusion of older workers.

The targets of the programme are to increase the numbers of older unemployed people who find new jobs, and to ensure that persons who are active in working life can continue to work longer than before. A further objective is that both the employed and the unemployed remain healthy and maintain their physical abilities, thus improving their quality of life also after retirement.

The programme is led and run in an integrated way. The leadership is formed of four ministries (social affairs and health, labour, education and trade and industry). The main responsibility for the programme is with the Ministry of Social Affairs and Health. The Programme Management Committee also includes representatives of the main labour organizations, the Associations of Finnish Local Authorities, the Institute of Occupational Health, the Social Insurance Institution, the Federation of Employment Pension Institutes, the Federation of Finnish Entrepreneurs and the Central Union of Agricultural Producers and Forest Owners.

The programme includes more than 40 different measures to reach the set targets. The principal evaluation measures monitor the employment rate of the (ageing and aged) working age population, the risk of unemployment associated with age, and the early exit rates of the ageing workforce. More specific monitoring includes indicators for the improvement of workability and professional skills of these age groups, and assessments of the feasibility and effectiveness of the intervention measures (e.g. that of the maintenance of workability). A special ‘maintenance of workability barometer’ has been established to follow up the prevalence of maintenance of workability actions at working places. A correspondingly wide range of research accompanies the programme for ageing workers, and is coordinated by the Programme Management Committee.

The interventions include: changes in labour legislation; information campaigns based on research information; education programmes; changed legislation to combat discrimination; and measures for labour protection and reform of the pension system. They also include funding for research and demonstration projects. During the programme it has become apparent that change in the age structure of the labour force is a basis for social innovations in working life. Innovations in management and work organization are needed to combat early retirement. The Finnish national working life development programmes and also the European Social Fund have co-financed innovative work organization development projects in the age programme.



Chapter 6

Active Strategies and their Evaluation: Presentations and Conclusions of the Working Groups

This chapter draws together the main presentations and results from the working groups at the conference.

1. Active welfare and labour market policies for reintegration into employment

Older workers tend to have a relatively low status in the labour market: they experience discrimination with regard to job recruitment, in most Member States they are disproportionately represented among the long-term unemployed and when they become unemployed they remain so for longer. Nevertheless, data from a recent Nordic research project by R. Lilja (conference material) showed that the vast majority of older job seekers have a clear active work orientation which includes job search, reading announcements for vacancies and even contacting potential employers directly. However, the longer the period of unemployment lasts, the more failures that have been suffered, and the nearer the moment to be entitled to pension or other benefits, the more this active work orientation is replaced by a retirement orientation.

Typical labour market measures for older unemployed workers include vocational training, social support and counselling, assistance with job search, wage subsidies and other reductions of wage costs, support for start-up enterprises and self-employment, and partial pension schemes as a tool to prolong working life. However, there is clear evidence of their compensatory and reactive character. Moreover, apart from a few country studies, nothing is known about their effectiveness based on systematic evaluation.

There is general agreement – although often misunderstood - that gradual retirement should be regarded as part of work-time adjustment and not as a kind of preliminary stage of full retirement. It aims for adaptation of working time to changing abilities and preferences of workers towards the end of their career. However, G. Naegle (conference material) emphasised that the concept of gradual retirement needs to be integrated systematically into a fundamental rethinking of an employee's entire working life. In the context of demographic developments, the hitherto prevalent division of a person's working life into three sequential stages - with training periods becoming ever longer, professional life being shorter, and retirement starting even earlier - is not sustainable: 'In OECD countries, people are retiring earlier and living longer once retired. In 1960, a man in a typical OECD country might expect to live 68 years, of which 50 would be in employment and only 18 out of employment, mainly going to school. Today, a man might expect to live to about 76. Only half of those expected years (38 years) would, however, be spent in employment. The main change has been growth in the time spent in retirement' (Hicks in conference material). Furthermore, it makes little sense to extend the period of retirement without offering productive roles to the people concerned which are both individually satisfying and useful for the society.

Working Group a: Measures for reintegration of longer-term unemployed

In the working group on 'Measures for reintegration', the initial presentation by M. Maiello presented a cost-benefit analysis of social co-operatives as an integration measure for the very disadvantaged in the labour market. The development of social co-operatives provides opportunities, under Italian legislation, for the work integration of the most disadvantaged in the labour market, who very often are older long-term unemployed persons.

The evaluation was made in the autonomous region of Trento which is an area of high employment. Although most people can easily find a job, the disadvantaged in long-term unemployment cannot. The target groups included physically and mentally handicapped persons, those with mental illness, former offenders and prisoners, former or current drug addicts. Many of these included substantial numbers of older workers. Subsidies are received for the labour costs of the disadvantaged though these decline over a 2-3 year period; the ultimate goal is to develop the autonomy of long-term unemployed workers and enable them to enter the 'normal' labour market.

Cost-benefit analysis is uncommon in evaluating labour market programmes for such groups since usually other benefits such as improving human social capital, social integration or ethical considerations are proposed. Despite being a very expensive programme – 2.5 million Euros were spent over 6 years – the cost-benefit analysis provided an entirely economic demonstration of the success of the programme. At the point of evaluation, which is now a standardized, computerized and on-going process, approximately 54 % of the 123 persons who had completed the process were back at work, 71 % of these in private firms and 19 % in the social co-operatives. The program indicated that for every 100 Lire spent by the public sector there was a total benefit of 481 Lire.

This form of evaluation provides a 'hard-nosed' case for the economic benefits of integration measures for the most disadvantaged. The model of the social enterprise is one that should be considered for older workers in long-term unemployment all across the EU Member States. Moreover, the lessons to be learned from this are applicable to other social co-operatives and new self-sustaining, not-for-profit initiatives in Europe that seek to create work and the reintegration of the long-term unemployed.

A second presentation in this working group was given by F. Gonzalez (see conference material). His report was about the results in Spain of the action research programme 'Eurocounsel', run by the European Foundation for the Improvement of Living and Working Conditions between 1991 and 1995. This was designed to examine the quality and benefits of counselling services for the long-term unemployed or for those threatened with redundancy. The provision of counselling includes a whole range of different types of intervention. In Spain new counselling providers have emerged, involving administrations at regional, district and local level and non-government groups.

The case study was in a rural village, dependent on seasonal employment to a large degree, with a culture of dependency and low expectations of finding work. Evaluation which was built into the intervention measures from the very beginning involved the participation of all actors, and used measures that were quantitative and qualitative. Projects included, for example, the employment of 40 rural women through the development of co-operatives (five were developed). The creation of local networks enabled the co-operation of women of different ages and educational levels, which was an effective way of grouping different skills and abilities and a model for others. Evaluation showed that a good proportion of the participants started their own enterprises. Even those who did not gain non-material benefits like greater self confidence, a desire to continue job-seeking efforts and higher prestige within the family.

The Spanish case pointed to the importance of incorporating different stakeholders' perspectives in the evaluation – the funders, the practitioners (service providers) and the users/clients, as well as other actors such as employers and trade unions. The case also stressed the importance of an integrated approach involving the key actors from the earliest stages of the initiative. The participation of local employers and trade unions helped to keep links with the local labour market. Various measures including employment guidance and counselling, training, business and personal development were combined to meet the needs of the client group. Gonzalez illustrated the importance of clarifying from the outset that evaluation should take place and giving information on its objectives, target audience, actors involved, the funder, the type of evaluation. Transparency is a key issue.

One of the conclusions referred to methods to be used when evaluating counselling services for unemployed workers: 'From our point of view, it is necessary for assessment to incorporate qualitative methods that bring the user's opinions into the assessment, as well as quantitative methods or tests that break down results according to the viewpoint of the assessors or the body that agrees the assessment plan. We also feel it is necessary to incorporate an overall assessment

including other actions in the same area; this would require assessment mechanisms throughout the process and its completion, beginning with the paradigm of plasticity and comparing the contributions and changes made to individuals' lives and the areas in which actions take place' (Gonzalez in conference material).

Discussions among the participants underlined the significance of the examples chosen, in part because they brought a southern European perspective to the issues of reintegration and of evaluation. Though employment in social cooperatives might be useful in assisting those in severe labour market difficulty, there were concerns about whether and how older workers could be motivated to participate.

From the case evaluation and from the discussions, the following conclusions were drawn:

- Taking older long-term unemployed persons into special measures like social co-operatives or providing them with individual targeted counselling services may appear expensive, but it can, in fact, be effective. Both case studies showed: 'You can do it and it is worth doing it, and it even pays off economically'.
- While it is important that hard financial cost-benefit analyses are made to demonstrate the benefit of measures, there are other benefits accruing from reintegration such as those for the local community and the families of individuals, as well as to the overall quality of life, skills and self-esteem of the individuals.
- One measure of success lies in the improvement of an individual's workability and employability in the private sector. Social solidarity can be efficient and profitable but managers and participants must be aware of the market and scarce resources.
- Social enterprises in their various forms in the EU Member States can be one of the most effective vehicles for labour market reintegration of the disadvantaged, including older workers, even in areas with unemployment.
- Mixing different ages and abilities in labour market measures can be effective, to stop older workers being ghettoized and improve intergenerational solidarity.
- There is a need to reflect within evaluation on the transferability of initiatives to different cultural contexts and to different target groups. Evaluations tend to examine true success and failure factors within the context of the specific initiative or measure alone. Whether similar success rates can be achieved elsewhere has to be examined carefully.

Working Group b: Gradual retirement and part-time pensions

Part-time pension schemes can theoretically be regarded as a tool to prolong working life and therefore as an active instrument to meet the challenge of an ageing workforce. However, the low take-up rates of gradual retirement schemes (except in Sweden) are regarded as extremely disappointing. The discussion in the working group aimed to highlight the reasons for this failure and to identify conditions to help part-time pension schemes to be more successful in future.

Takala's report about the part-time pension programme in Finland (see conference material) principally confirmed the low take-up rates. However, they are on the increase since the

qualifying age was lowered to 58 (instead of 60) in 1994 and again to 56 (for the period between July 1998 and the end of 2000) in 1998. The Finnish part-time pension system was originally expected to become an alternative to the disability pension. It was also expected to reduce unemployment, as new employees would be hired under part-time arrangements. However, the part-time pension schemes are used much less than disability pensions or unemployment pensions. Those who have used the scheme speak favourably of the experience, e.g. no 'outsider' feelings, no job rotation necessary, smoother transition into retirement, working life became easier to the extent that it could be possible to continue working up to the general retirement age. But there are no indications – and this is true in all countries with this option – that the part-time pension is an instrument to prolong working life beyond normal retirement age. The Finnish report also confirmed results of experiments in other countries (including Sweden) that partial pension schemes are to a great extent used by white collar workers.

In her commentary Reday-Mulvey referred primarily to the experience since 1993 of part-time pension schemes in France. There, the introduction of part-time pension schemes aimed to replace early exit, but with very limited success. It seems that the low success rate is due to the popularity of alternative exit routes, in many cases based on enterprise plans or more generous end-of-career unemployment benefits. In Germany (since 1996) the basic idea of the so called 'old age part-time scheme' – the earliest possible qualifying age is 60 – is in danger of being undermined by collective agreements or in-company agreements. In most cases, there is no real part-time work: employees entitled to agreements of this kind continue to work full-time, as the part-time periods are 'bundled' into full-time periods. In consequence, instead of 5 years part-time work, employees work full-time for 2.5 years, and those concerned can then go into (early) retirement at 57 ½ years. In other words, part-time pension schemes in Germany serve as a tool to reinforce early exit.

Unlike most countries with partial retirement schemes, take-up rates in Sweden are relatively high. However, the Swedish success, apart from reflecting the traditional good partnership between the State and enterprises, mirrors primarily both the availability of part-time employment as such and a long standing tradition of flexible working, including part-time work by male workers. These preconditions appear to be missing in other countries, apart perhaps from the Netherlands. However, the Swedish 'model' will soon belong to the past as in 2000 the flexible partial pension/part-time scheme, being deemed too costly, is due to be wound up.

In evaluating the experiences so far with part-time pension schemes Reday-Mulvey (see conference material) underlined the following requirements for successful policies: need to actively promote part-time work at the end of a career; positive in-company 'partial pension climate'; entitlement to change from full-time jobs to part-time jobs and vice versa; continuing training to keep workers motivated and productive; co-ordination of government and company policies in terms of public incentives; and union support, which requires a change in the hitherto prevailing assessment by unions concerning early exit.

The final discussion in the working group emphasised the following ‘messages’:

- Part-time pension schemes are probably not suitable for prolonging participation in working life; they cannot replace an active age-management strategy investing in human capital. If partial retirement schemes are regarded as a tool to prolong working life different incentives are necessary. However, in certain sectors of business and for certain groups of older workers, early exit might still be necessary even if good age management prevails (see section on early exit in Chapter 2).
- To be successful on a broader basis, part-time pension options need both full employment, which is lacking in most EU Member States, and an overall demand for labour. The labour market determines whether and how partial retirement schemes work.
- When (re)designing partial pension schemes there is a need to reflect on the following: i) interests (mainly in terms of cost-benefit analyses for all partners involved, above all enterprises and workers themselves); ii) target groups; iii) goals (prolongation of working life or optimization of individual adjustment); iv) unintended effects (promoting early exit, promoting unemployment of other groups in society, creating new social injustices) and v) social protection expenditures.
- To gain a better understanding of the successes and failures of part-time pension options there is a need to know about the mechanisms that motivate individuals – managers or workers who think about their career perspective. In doing this a long-term view is necessary: in 20 or 30 years new generations of older workers might be more flexible (e.g. thinking in terms of a ‘second or third career’).

2. Reorganization of work and working time

In his presentation Naegele referred to structural changes in the working life course (see Chapter 2 under early exit). He underlined the need to rethink the traditional life course in favour of a model in which learning/training, work and leisure run parallel to each other throughout a person’s life. However, institutionalized links between the three areas must be guaranteed at the same time. In other words: working time should be combined with offers of further training, health promotion and the organization of leisure time.

Flexibilization of working time over the life course could be a tool to prolong working life on a voluntary basis and thus to decrease early exit. In order to be more successful and accepted on a broader basis, gradual retirement schemes should be strategically integrated in a new organization of working time over the life course.

Further arguments for the reorganization of working time are that it is a tool for better adapting change in a person’s work capacity over an entire working career, to work loads and to physical and mental job demands. Simultaneously, working time adjustments can promote both occupational flexibility and mobility, and opportunities for further training which are necessary preconditions to (re) enter or to stay in the active workforce. Traditional working time schedules are very often not in harmony with family duties and other personal interests and wishes which

often change over the life course. Time-related demands vary considerably depending on a person's stage in life and socio-demographic situation (such as child care, eldercare, vocational training, preparing for a second or third career).

Working Group a: Reconciliation of employment and caring responsibilities

The issue of 'reconciling' employment and caring responsibilities for adult / elderly dependents will become a bigger issue for both employers and employees in the future. This reflects several key trends: the number of those needing care is likely to increase with the growth in the number of frail, older people; cost-containment policies are leading to reduced levels of formal care services; modifications in the family structure (reduction in family size) and socio-economic changes (increasing participation of women in the labour market) are limiting the number of persons available or willing to provide eldercare, which, everywhere, is primarily done by women, particularly those aged 45 to 65.

'In conclusion, the developments described point to the fact that more and more women – but also men – will not be willing to or will not be able to give up employment for voluntary caregiving duties and this is also desirable from a labour market perspective. It can be assumed that most persons concerned want to put family solidarity into practice, and balance work and eldercare of their own free will. It follows that there are many important reasons to be more interested in recognising a reconciliation of employment and care as one of the big social challenge of the future concerning not only the world of labour but also social policy in general' (Reichert in conference material).

In the working group Reichert presented an evaluation of the policy adopted by the Siemens company in order to facilitate its workers in caring for dependent elderly relatives. Employed carers in Germany report high levels of stress and very often experience work interruptions and/or have to miss work altogether; have financial losses, for example, due to unpaid time off; miss business meetings and training opportunities and lose promotions.

There are also considerable negative knock-on effects of these problems for employers, but these are seldom recognised. For example, employers can be faced with decreased productivity due to the employee's lack of energy and poor health, absenteeism, poor morale and unwarranted use of working time and enterprise resources. However, the strongest negative consequence for employers can be seen in the loss of qualified, committed and experienced employees. Nevertheless, eldercare and employment has not been widely recognized among German employers both because the needs of working carers are not well known or communicated and because employers are hesitant, for cost and other reasons, to view this type of care as a workplace issue.

Among German enterprises Siemens is one of the very few to have a policy and to offer programmes. The measures involve flexibility in working time and place of work and leave options, as well as an information and referral service, and counselling and advice in connection with company-based social work measures.

Perhaps, surprisingly, nothing is known about the costs and the benefits of the measures, primarily due to a lack of company evaluation and research. Evidently, there is a need for more evaluation research, including economic analysis, particularly on a longitudinal basis. On the basis of experience in Siemens and elsewhere in Germany, it appears that programmes and models used for co-ordinating work and childcare cannot be transferred simply to eldercare. To motivate employed caregivers to make use of existing programmes they should be offered as an integrated part of a variety of services that a company provides to help all employees in different situations – of which this type of care is just one. As a precondition, a ‘supportive and family friendly workplace environment’ is needed in order to prevent potential users of enterprise services from feeling stigmatized and ‘different’ to other employees.

Lamura reported that southern European countries seem generally less equipped to supply formal support to frail elderly people. As a consequence public measures which might help caring workers are generally lacking, except for paid leave which is available in Italy and Portugal (in the latter only for civil servants). Unpaid leave theoretically is possible in all Southern European countries but in some countries is restricted to certain periods. Part-time options are possible but rare, apart from Italy and France, where they are also legally encouraged. In addition under certain circumstances economic support for caring is available in all countries, but usually at a low level.

The final discussions in the working group emphasised the following issues and recommendations:

- Eldercare particularly concerns older workers, especially women. There is an urgent need to create measures and policies to better reconcile working and (elder)caring obligations. They should primarily be enterprise-based, but there is also a need for public policy incentives for both in-company agenda-setting and measures. The smaller the companies are the more help is needed from outside.
- To create awareness among policy makers and social partners and to acknowledge the balance of work and eldercare as a public (and not a private) problem are both significant preconditions for successful policy approaches. However, it seems that attention to this topic will only occur once companies feel the negative consequences of caregiving on the workplace and/or of a labour shortage more strongly.
- In-company measures should be systematically linked with local public agencies and social services. The idea of local partnerships between companies and caring agencies should be advanced. However, there is agreement that the services themselves have to be further developed.
- There is a need for more qualitative information and for both quantitative and longitudinal surveys, particularly regarding the needs and interests of different groups of caregivers. Critical examination of existing in-company measures is poorly developed and should be advanced. This particularly refers to effectiveness and cost-effectiveness. Evaluation is also needed to promote both the dissemination of good practice and transfer and take-up.
- Evaluative research must take into account unintended consequences of supportive measures: e.g. do ‘specific’ measures produce stigma and thus social isolation or lack of

take-up? Since the position of women in the labour market is still far from being comparable to that of men due to traditional role patterns and since most of the working carers are women, specific 'measures' such as paid or unpaid leave bear the inherent danger of being counter-productive in terms of further weakening women's position in the labour market.

Working Group b: Job design

Job (re)design belongs to the traditional catalogue of active measures aiming to improve the working conditions of an ageing workforce, particularly when faced with changes in functional capacities (see also Ilmarinen 1999: 58 ff.), or when they are disabled. Therefore, for example, job (re)design in most cases is also part of measures for vocational or medical rehabilitation. In this connection, 'age friendly job design' should include the following objectives (Kuhn et al 1998: 16): adapting the workplace, premises, equipment, working hours and processes to the employee's changed capacities; taking the changed capacities of older workers into consideration by selective organization of training opportunities; workplace-based measures for occupational safety, health and rehabilitation.

K. Kuhn presented a case study on 'Age related workplace design in tyre assembly: the example of Continental'. The project was initiated because a certain group of production workers – tyre assemblers – gave up their work or had to be transferred to other working places at approximately the age of forty. This caused personal and social problems for the workers, while the company suffered from the premature loss of experienced personnel and the financial burden of the relatively high training costs for new appointees. The following important features of the tyre assemblers' working conditions were identified: repetitive, fine-motoric activities with the emphasis on speed; short cycle times; pressure of time; monotonous work demanding high concentration; rigorous requirements regarding sight; inadequate break arrangements; and strain associated with night shifts.

The job re-design measures had three major starting points:

- **technical:** ergonomic measures applied to the process, the equipment and to the workforce environment as a whole;
- **organizational:** introduction of team and group work systems;
- **individual:** employees' training in age-specific settings.

The positive outcome of the re-design can be seen most clearly in the fact that the proportion of tyre assemblers over 55 years of age rose from 6.5 % in 1977 to 27.6 % in 1984. The proportion has since dropped due to a general rejuvenation of the workforce.

Evaluation of the Continental case study underlined the importance of age neutrality which must become a matter of routine in the development of new machines and work systems. Company management must be more aware of the long-term effects of solving the problem of age, instead of looking at the short-term effects of additional costs for new system design. Group work models remain a major future prospect for older employees. Under the given ergonomic conditions and

with the mixing of employees of all ages, group work is the only possible response to the rise in senso-motoric strain caused by greater unit outputs.

More generally, the experience of job design in Germany has shown that new concepts for an integrated labour policy should be developed which are geared not only to single aspects, but comprehensively to work design (work organization and technology), working time, co-operation and social relations, health promotion, performance regulation and qualification with the aim of integrating older employees for as long as possible.

In addition to the initiatives for long-term integration that are possible in the company, exit should also be tackled as a new design field, e.g. considering change to external fields of employment (pools, second or third careers). Inter-company and cross-company problem-solving approaches ('networking') should be developed to create new fields of employment.

The commentary prepared by B. de Zwart drew attention to parallels between the findings of this case study and a recent European Agency survey of case studies. He emphasised that the loss of competence for an enterprise due to early exit is one of the main reasons for starting interventions, such as job design. Another important starting point is the high training costs of new employees. Experience shows that management must involve the employees from the very beginning of the job re-design process ('participative ergonomics'); this is crucial to their final success. Furthermore, job design will be more successful if it is guided by 'the concept of human job design' which takes account of differences between individuals and changes in their abilities over the course of time.

The final discussion in the working group highlighted the following additional conclusions:

- In-company safety and health specialists should be trained in the social dynamics of workplace changes.
- Interventions in job design intended to benefit older workers should be 'age-neutral' and not age-specific. It should be possible to create age-neutral working places. Age neutral working places allow a healthy employee to continue to work up to retirement at a set age or even longer (see Chapter 3).
- Although the individual worker is a beneficiary of good job design, and should be involved in the planning of any change in the work process by the application of 'participatory ergonomics', successful redesign of jobs has to be done at the enterprise level, in the context of the whole organization.
- A wide range of different kinds of information are needed to inform policy and practice. Research often fails to demonstrate clear cause-and-effect relationships, so wider use of the tools of epidemiology is called for. In the relationship between research and policy there is a need for indicators and monitoring systems that go far beyond traditional research but that give public policies relevant hints. There is also a need for both quantitative and qualitative data in analysing successes and failures of job (re)design approaches.

3. Maintenance of the employability of older workers

The EU Employment Guidelines stress the importance of employability and the range of public policy, workplace and community factors which contribute to its promotion. In the case of older workers, both training and the maintenance of good health or working capacity are key considerations.

Education and training for older workers: Introduction

The European Employment Guidelines explicitly underline the need for lifelong learning which particularly affects an ageing workforce. Training is regarded as a pivotal resource in terms of both meeting the demands of today's and tomorrow's working places, and to strengthen the competitiveness of an ageing workforce. 'The global economy with its growing competition, rapidly changing technology, organizational restructuring, high performance working places, and needs for skilled workers underscores the importance of continuous worker training and retraining' (Rix in conference material). Although age-related learning differences and difficulties can be overcome (Kilbom, 1999), age-specific skill problems exist, which, as a consequence, considerably affect the employment chances and prospects of an ageing workforce. This is particularly true for the older unemployed. Research has shown that education and further training pay off, for both the workers themselves and the companies. However, the prevailing practice of in-company training is far more common in large companies, which leads to clear disadvantages for workers in smaller companies, for part-time workers and for less-educated workers, and in particular for older workers, who tend to be under-represented in employer-provided training programmes.

'Employers give priority to training those workers they deem most valuable or promising to their organizations, most capable of learning new skills, and most cost-beneficial to train. Their questions about the learning ability of older workers, as well as the costs of and returns in training older workers, help explain older workers' under-representation in training programmes. Workers who fail to get training not only risk obsolescence, they reinforce stereotypes about older worker trainability and flexibility or adaptability. These stereotypes then serve as impediments for further training' (Rix in conference material). The United States Age Discrimination in Employment Act of 1967 (ADEA) has not been able to prevent this kind of 'exclusion'; nonetheless, the ADEA is an important protection for older workers willing and able to insist on their legal right to training.

Rix explicitly focussed on which institutions might be able to turn the prevailing practice of training older workers. Referring to US experiences, in her opinion government, on national, regional and local level, should have a responsibility, along with enterprises and the (older) workers themselves. Moreover:

'Government, particularly at the state and local levels, has an obvious role in promoting the conditions that foster job development. However, it is probably also government's responsibility to assess local labour market opportunities, identify skills needed for current jobs, assess where the jobs are likely to be over the next five years, identify the skills the

‘new’ jobs may require, ascertain where appropriate training can be obtained, and in some cases provide the training, but in all cases make this information widely available’ (Rix in conference material).

In this connection using the term ‘older workers’ to identify the target populations makes little sense: ‘It is almost meaningless when it encompasses workers and jobseekers aged 40 or older, as it does in the United States’.

Among the public policy initiatives to promote lifelong learning discussed by Rix was the One-Stop Career Centre System. This is part of the effort by the US Department of Labour to consolidate the nation’s fragmented employment and training system into an integrated employment and job-training service that enables workers and job-seekers to find at a single site (‘one stop’) all the information they need on employment opportunities, labour market information, skill requirements for jobs, unemployment insurance, and education and training programmes. One-stop centres have been created at numerous localities in the various states.

The Workforce Investment Act of 1998 institutionalizes and expands the One-Stop Career Centre System and reforms the local governance of job-training programmes by creating a partnership of local private-sector business, labour, education, and community groups, as well as elected local officials, to serve on newly formulated Workforce Investment Boards. Consistent with the notion that workers should manage their own careers and that they are themselves in large part responsible for remaining employable, the legislation aims to empower individuals by giving them greater choice of, and control over, their training and retraining.

Rix argued that older workers themselves should be encouraged to find better access to further training opportunities. This could be done, for example, by making older workers more familiar with the ADEA, by tax incentives to stimulate workers to seek training on their own, or by encouraging older workers to take advantage of available tuition assistance, which is financial help offered by many companies to cover all or part of the cost of tuition charged by educational and training establishments.

Working group a

In the working group on ‘Education and training for older workers’, T. Tikkanen acknowledged that, while there has been growing emphasis on the value and importance of lifelong learning, older workers have generally been excluded from taking up education and training opportunities. She presented some preliminary results of the European research project, Working Life Changes and Training of Older Workers. The findings referred primarily to the fact that while age as such does not significantly affect learning, it is a significant factor in terms of people’s access to or use of educational and training opportunities, whether through discrimination or the attitudes of older workers themselves. However, the study only covered older adults in employment, and almost all of them in full-time, permanent jobs. As a consequence, there was no information available concerning the unemployed or those working under other job contracts. In terms of the basic commitment of the Turku Conference, one of the significant findings of the study was that, for the

continuous development and lifelong learning approach to flourish in the companies, it has proved necessary to develop co-operation and networks locally with relevant training institutes. In many cases, however, this is difficult without external support, particularly in small and medium sized companies with rather low levels of education among employees (and often also among employers).

In the second presentation in this working group, M. L. Mirabile underlined the need for adult education/training to be an integral part of an employment policy. Increasing opportunities for lifelong learning and training should be seen as a crucial component of welfare reform and more specifically as a policy to promote equal opportunities, as education and training provide support to employability. In the European Member States, both approaches, lifelong learning and continuous vocational training, are used. However, there is no shared conceptual understanding in the different national contexts. Therefore, there is a need to examine carefully whether and how the country-specific conceptualizations relate to the overall goal of maintaining and improving employability. Continuous training requires a context of industrial relations in which the actors appreciate the value represented by older workers in terms of human capital, and an integrated framework of initiatives, with particular emphasis on regulatory policies (work hours and pension policies), incentives and career planning.

Conclusions and recommendations that emerged from the discussions in this working group can be listed as follows:

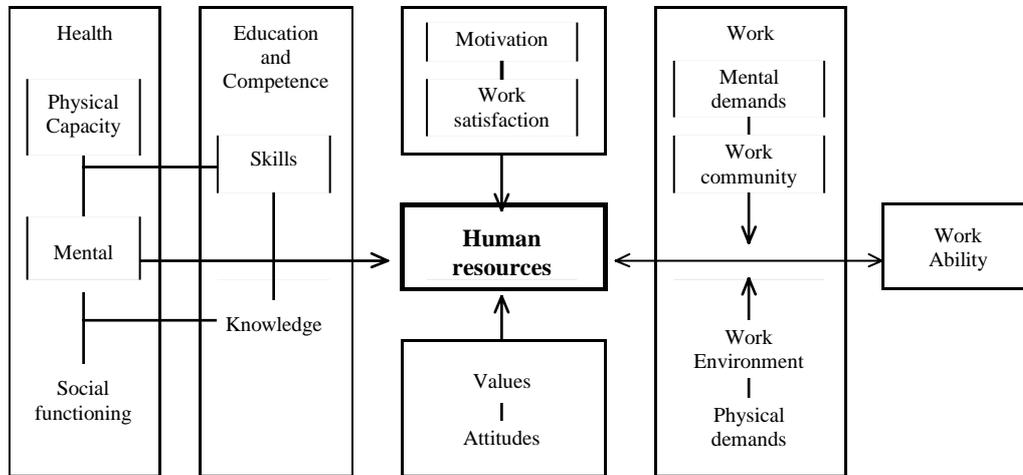
- The effect of chronological age on the impact of training is negligible. However, age-discrimination is prevalent and therefore the organizers of education and training for older workers need their awareness raised. In future, the growing adult training market needs to be developed in a way that is meaningful to people of all ages. All the different partners need to be involved but public policy has to play a key role in facilitating the integration of the different partners.
- There is no common understanding of terms such as lifelong learning in Europe or in individual countries. There is, however, a general tendency to limit the concept to vocational learning and to working life and thereby to exclude older people and older unemployed people.
- When designing lifelong learning approaches, until now, the official educational systems have not been involved. There are no institutionalized links which would be necessary in order to further develop training as an active policy approach.
- Older workers themselves must be actively involved in the planning, organization and evaluation of education and training programmes for an ageing workforce.

Workability and health: Introduction

The comprehensive concept of workability was introduced by J. Ilmarinen. It refers to both individual and occupational factors that are essential to a person's ability to cope throughout their working life. Workability is the result of the interaction between the individual's resources, working conditions and work organization. A person's individual resources include health,

functional capacity, basic and professional education and skills. The resources are also influenced by the person's values and attitudes, motivation and job satisfaction. (see figure 1).

Figure 1: Factors influencing workability from an individual point of view.

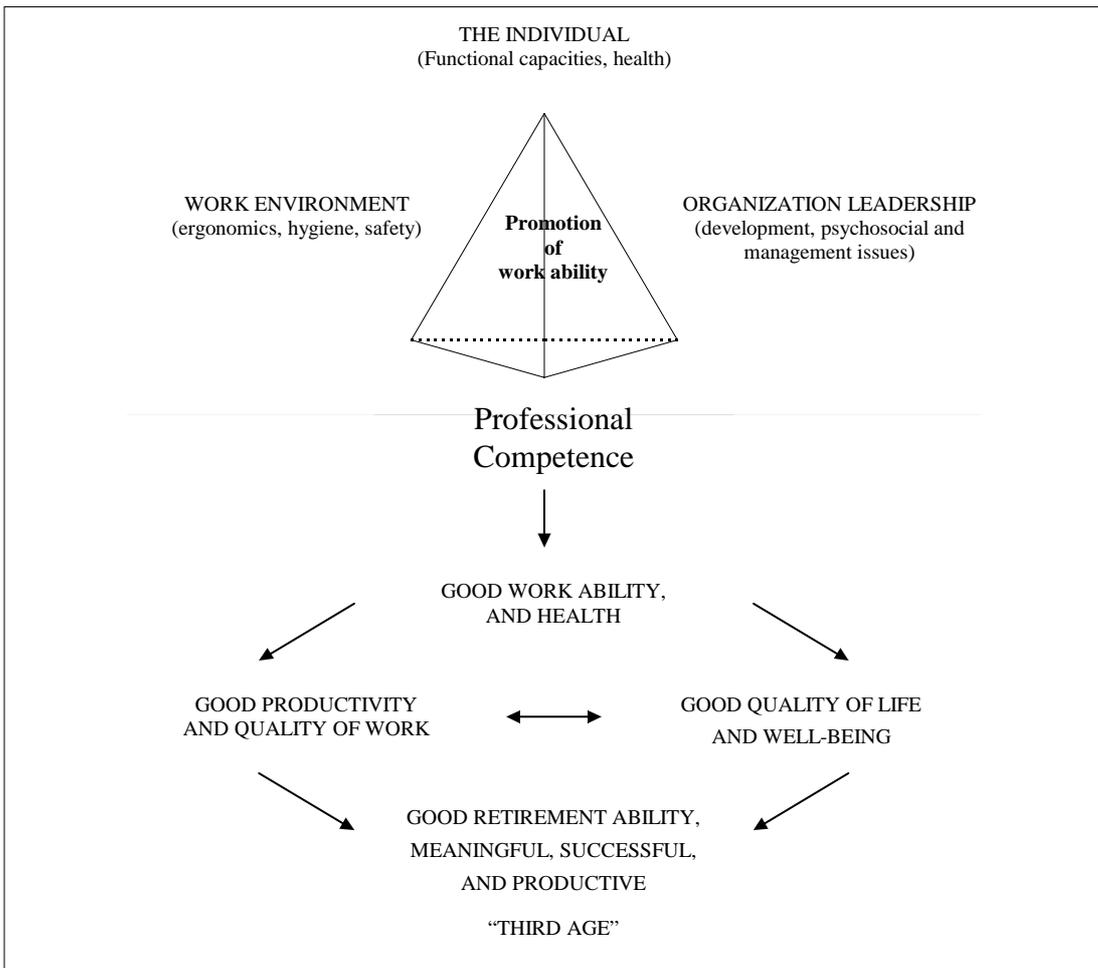


'Good resources do not transform into good workability unless the content of the work, the work community and the work environment provide the proper conditions. On the other hand, a well-operating work community or work environment cannot fully compensate for weakened resources. A system of feedback also exists between workability and its components. ... (promoting) workability is a dynamic process that changes through its components throughout life. In addition, a person's workability is bound to the surrounding society and enterprise and to both immediate and micro networks (for example, family)' (Ilmarinen in conference material).

Thus workability creates the basis for the employability of an individual. Increasing the employability of an ageing workforce, therefore, requires an increase in its workability. Promotion and maintenance of workability have to be regarded as an active strategy for coping with the challenge of demographic change in the labour market, particularly with the rising age-related health risks. Therefore, improving workability is also a tool to prevent both a premature loss of functional capacities and disability.

The basic model for actions aimed at maintaining and promoting the workability of an ageing workforce is built on the integration of four different lines of action. Two of these lines concentrate on the content of work and the other two on the individual (see figure 2). Actions targeted towards work concentrate on the content of work and also on the physical and social work environment and the work community. The actions targeted towards the individual, on the other hand, concentrate on strengthening the health status and functional resources of the worker and developing professional expertise and abilities. Improving the workability of ageing workers leads to improved work quality, increased productivity, and also to an improved quality of life and well-being of the workers concerned. Also long-term effects could be expected in terms of facilitating the process of adaptation to retirement.

Figure 2: Basic model to improve workability during ageing.



Measures and solutions are targeted toward the individual worker, the enterprise and the society. All three of these parties are needed because they form a network of mutual interaction. If one party is alienated or does not participate wholeheartedly, positive results are unattainable. Enterprises and work organizations make up the most critical party because the goal is to employ ageing people. The task of society is to create good conditions for the employment of ageing workers. The workers, as individuals, must also take responsibility.

Working group b

In the working group on Workability and Health, Husman reported further on the Finnish programme on the Maintenance of Workability. The concept took root in the latter part of the 1980s when the economy of Finland showed constant growth and the established early disability pension systems of the private and public sectors had proved much more popular than expected. It was estimated that the ageing of big age cohorts born after the second World War would cause a considerable deficiency of the labour force within 20-25 years.

In 1992 the National Advisory Board for Occupational Health defined maintenance of workability as all the actions employers, employees and the co-operative organizations of the workplace carry

out together to promote and support the work and functional capacity of all persons at all ages throughout their working careers. These types of actions have been identified as a means to maintain or restore the employability of the long-term unemployed persons, and also as the means by which the objectives of the Finnish Programme for Ageing Workers are to be achieved.

The maintenance of workability has been subject to various evaluations. At the National Advisory Board of Occupational Health meeting in 1998 it was proposed that the original concept definition be amended to improve clarity and widen the orientation of its implementation. The Advisory Board has contracted the Occupational Health Institute to perform follow-ups of changes in the content of occupational health services. In connection with the information collected for the Finnish Programme for Ageing Workers, a maintenance of workability barometer has been established, giving information on the frequency of maintenance of workability actions in Finnish workplaces of various size and sectors. The first report was published in 1999.

Finally, in the collective wage agreement of 1998, the social partners agreed that they would evaluate the effectiveness and further requirements of workplace maintenance of workability activities. The evaluation has been carried out in 1998-99. Concerning the long-term unemployed, an action plan was prepared jointly by the Ministry of Labour, Ministry of Social Affairs and Health, the Social Insurance Institution, the private pension insurance companies, and the Finnish Association of the Local Authorities in 1996. The target population consisted of 50-58 year old unemployed persons in ten towns. Some 10,900 persons were interviewed by the local employment authority personnel and referred then to the various services (employment, training, health, rehabilitation). The evaluation of the action process and effectiveness has been carried out by the Research and Development Centre of the Social Insurance Institution. The final report is due in 1999. In addition, the effectiveness and economic effects of maintenance of workability programmes have been assessed in several research and development projects, some of which are comprehensive. Many of these have been funded in part by the European Social Fund.

In summary, the maintenance of workability has spread well to Finnish workplaces. According to the Maintenance of Workability Barometer, those which have been allocating most resources to these actions are municipal and state organisations and big enterprises in the private sector. These employers also seem to have confidence in the economic benefits of maintenance of workability actions. Although occupational health services seem to have a major role, good co-operation among managers, employees and occupational health services seems common. However the actions need to be integrated into the everyday practices of the workplaces and support is required for developments in small enterprises. There is a need for research and economic support to expand actions to cover not only the individual physical health aspects of employees but also working conditions, work organization and the community in a wider sense.

Concerning the action plan established for the older long-term unemployed, the model was expanded to the whole country in 1998 when employment legislation was revised.

In his commentary, R. Wynne focussed on promoting and maintaining the health of ageing workers. He underlined the need to bring together a considerable range of health-related skills and expertise when implementing a comprehensive and wide-ranging workability/employability policy. There is a need for an integration of health-related services with other enterprise-based services such as human resource management, training and job (re)design. However, there are considerable practical difficulties in designing effective services in the EU Member States (e.g. the scarcity of appropriate services, the challenge of reorganizing and integrating these services, the cost question including its distribution between the public and the private sector, the need to change the working concepts of all of the stakeholders concerned with the issue of workability and employability). In the case of Ireland, for example, there is no consensus among the social partners on the need for such a programme, and the occupational health infrastructure and the rehabilitation services available are not developed enough to deliver a widely available and integrated programme.

These are significant challenges, even in countries where the basic health infrastructure is strong, but it will prove to be very difficult where there is a weak tradition of undertaking workplace health actions. In practice, it is likely that each country will need to develop a set of structures and services which are relatively unique. In other words, the configuration of workability services will vary significantly from country to country.

In the final discussion, the following aspects were emphasised. They refer to the political context, to the enterprise level and to evaluation:

- There is general agreement that the problems of ageing workforces, high unemployment amongst older workers and projected labour shortages, if not already significant, will affect all Member States in the medium term, and that workplace health services will need to develop some concept of workability and employability to cope with the challenges.
- There may be tensions between health objectives and economic objectives as well as between different interest groups, which need to be taken into account and balanced carefully. The central precondition for the success of the Finnish model is the good relations between the social partners on the one hand and the government on the other. The Finnish model also shows that common interests are the basis of deciding approaches, otherwise a lot of persuasive work has to be done.
- The Finnish model cannot simply be transferred into different countries as it particularly concerns the Finnish occupational health services. One of the key success factors in Finland is that the Finnish health system is publicly organized and to a great extent publicly funded.
- For small and medium sized enterprises, specific models for occupational health and safety activities are needed. For them tailor-made services are necessary ('and not a lot of experts are trying to help them').
- The improvement of workability during ageing requires balance between all four dimensions of the basic workability model (see figure 2). It is not adequate to concentrate on the individual health status. As the evaluation shows, work organization and the physical and social work environments must receive due attention.



Chapter 7

Perspectives and Priorities of the Key Actors

The key actors in age management are the social partners and government at different levels, but also the NGO sector. *H. Lourdelle* presented the European trade union perspective. He affirmed that the central question of today and tomorrow is how to create and maintain jobs. Policies should aim to allow workers to stay in employment until legal retirement ages if desired and there is a need to protect older workers against discrimination and unfair dismissals. Equally, lifelong learning is essential in order to maintain and improve the employability of older workers. Workers must be equipped to cope with change and to use new technologies. It will be important to consider more flexible ways of retirement in which, however, social protection must be maintained; this suggests further thinking on approaches to gradual retirement. The issues of an ageing workforce tend to have neglected equal opportunity aspects. Until now, older women have not been an explicit target group of active strategies, but should become so; and employment in the care sector should be developed to enable women of all ages to stay in employment. Finally, there is a need for tailor made in-company measures for an ageing workforce. Collective bargaining must create appropriate framework conditions.

B. Heinzemann presented the views of the European Employers' Association which built upon the distinctions between a short-term and a long-term perspective. In his opinion, in some countries, the overprotection of older workers is one of the main barriers to reintegrating older unemployed persons and, as a consequence, needs to be reconsidered. Moreover, improving social protection in favour of an ageing workforce should not lead to unintended counter effects: the employment risks of older workers should not be transferred to younger workers. Although unemployment is a prime concern today, in the longer term there is a need to take into account the expected labour shortage. As an important consequence, a nearly automatic improvement of the employment prospects of an ageing workforce can be expected. However, preparatory measures, such as

raising the employability of the workforce, have to be implemented in good time. There is a particular need to help small and medium sized enterprises in tackling the challenge of the demographic change in the labour market, but also to look at them for examples of good practice. Although there is much to be learnt from the experience of different countries, transfer must be done carefully as it is difficult to generalise good practice from one country to another.

J. Bustamante, representing the European Commission (DGV), underlined the necessity of supporting the principle of inter-generational solidarity. In relation to older workers, Member States are currently confronted by three major challenges: the necessity of creating jobs, particularly for older workers; changing attitudes towards work and early exit, particularly among older workers themselves; promoting training and retraining of an ageing workforce.

These challenges, at the same time, can be regarded as major driving forces that are behind the increased profile of older workers in the current European Employment Guidelines and, of course, the importance given to employment in the Commission's Communication on 'A Society for all Ages'. The responses of Member States in their National Action Plans for employment have indicated growing activity to support older workers, but the picture is very uneven and action needs to be strengthened substantially. This involves government, but there are also important examples of joint action by the social partners. More generally he argued that the possible adoption of the anti-discrimination package linked to article 13 of the Amsterdam Treaty should reinforce the position of an ageing workforce.

M. Dwarshuis emphasised the role of the NGO sector. She underlined the existing action undertaken by NGOs and urged greater efforts to develop a 'code of conduct' for employers. In relation to the European Employment Guidelines, it was evident that interpretation of the equal opportunities pillar had been narrowly focused upon gender rather than age and disability.

Also regarding initiatives at European level, *G. Keymer* identified key issues from the perspective of the Committee of the Regions. He argued that local, regional and central government have a role in setting a good example in employment of older workers – even if relatively little information from European research is currently informing these developments in local authorities. The Employment Guidelines were a welcome development, being both practical and clear in establishing roles for the different parties involved.

In conclusion, *R. Myhrman* from the Ministry of Social Affairs and Health in Finland highlighted the ageing of the workforce as a key issue for economic growth and efficiency of the labour market.

Rethinking of early exit policies

- The Turku conference was well-timed to make an analysis of public policy, societal and working life changes that are necessary during the first years of the new millennium. Early exit policies are likely to diminish, at least as the typical early retirement pathway. However, early exit cannot be abolished completely without alternatives for those who have to rely on such income – because of significant socio-economic reasons, such as long-term unemployment, poor chances of reintegration or severe health problems or disability. In some EU Member States early exit is still a highly appreciated tool to fight unemployment, particularly youth unemployment and therefore has still to be seen as part of an intergenerational contract.
- It was political will that helped bring early exit schemes into force and there was widespread acceptance. Now, it is the task of policy makers to promote the reversal of this trend. A diversity of incentives for all stakeholders is needed to support retention of older workers in the active workforce on both a voluntary and a productive basis. Incentives must also encourage investment in the human capital of the ageing workforce and equal opportunities for employment in good jobs. An integrated approach to public and workplace policies is needed, based on an active strategy which raises the employment and employability of an ageing workforce.
- The social partners have a key role both in rethinking early exit policies and in developing appropriate approaches at both public policy and enterprise levels. They can also significantly advance local co-operation. Evidently, there are tensions at different levels which have to be balanced carefully. Enterprises have begun to address the issues of an ageing labour force and leading enterprises are developing novel actions. Trade unions are

increasingly looking beyond the apparent short-term interests of older workers concerning early retirement to fight for job creation and promotion of employability in order to tackle longer-term needs effectively.

- In order to promote the employment and employability of an ageing workforce, action throughout working life is needed. Although key factors are known from research, less is known about how to effectively transfer this knowledge into public, labour market and workplace policies and practices so that the needs of the local ageing workforce are met.
- The Turku Conference recognised the importance of an approach that is sustainable and supports inter-generational solidarity. There is a need to consider the ageing of the population in relation to ageing of the workforce and the implications for the sustainability of pension, care and employment systems.

Towards active strategies and a ‘dual approach’ in favour of an ageing workforce

- The keys to influencing workability and employability are both active and comprehensive policies. In this regard, the conference went beyond the well known ‘active measures’ as usually discussed when tackling ‘older worker issues’. Active policy approaches have to be preventive, avoiding age-specific employment problems by preventing the development of risk factors in the earlier stages of professional life. It is no longer a question of supporting ‘older workers’ as a general overall goal of policy, but of finding means to make it possible that workers age normally in their enterprises and on their jobs – and at the same time remain productive to their full potential.
- Active and preventive measures should take a ‘whole of working life’ perspective and be embedded in the concept of ‘age neutrality’. However, there are still ‘age-specific’ employment and employability-related risks to be addressed and accumulated disadvantages, e.g. in training, that must be corrected. Therefore, some remedial approaches are still needed in the future. This particularly refers to measures for the so-called ‘risk groups’, such as long-term unemployed older workers, those with severe health problems, or workers with skill and competence deficits. This means adopting a ‘dual approach’ which will target the whole workforce but also those older workers at risk. Using these two strategy approaches in a balanced way will help to meet the challenge of the ‘greying of the labour market’ and defuse threats of the so-called ‘demographic time-bomb’.
- Older long-term unemployed workers need employment prospects. Otherwise, long-term unemployment will become an unavoidable obstacle to integration on its own. Although there are well-known approaches to support unemployed job seekers and to enhance recruitment chances, the conference highlighted that more and more specific efforts and programmes are needed (e.g. different kinds of services on the local level, social co-operatives and other forms of supportive employment opportunities along with other supportive services). Evidently, there is also a need to offer opportunities for self-employment within the older workforce. Presentations at the conference showed that reintegrating unemployed older workers can succeed and that it even pays off economically.

- The 'dual approach' of active strategies combining preventive and compensatory elements demands a fundamental change in the hitherto prevailing concepts, policies and attitudes of the stakeholders involved. Older worker policies must be seen as an integral part of promoting the employability of all age groups and vice versa. This particularly relates to public policies which have a clear responsibility for guiding incentives of every kind (providing information, promoting research, changing attitudes, stimulating enterprises, personnel managers and workers' representatives, developing supportive legislation). In this regard, external support to companies and especially for small and medium size enterprises to promote this 'dual approach' is urgently needed.

Towards integrated policy approaches

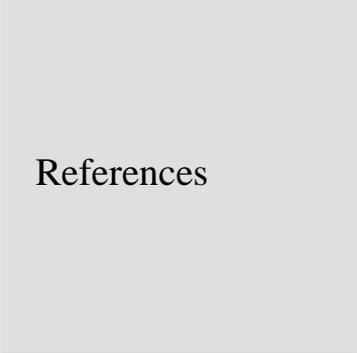
- The integrated policy approaches promoted in this report have their basis in the European Employment Guidelines. The Guidelines were used as a framework for the Turku Conference, its presentations and discussions. They highlight the need for the transition from passive to active measures, for lifelong learning, for promoting a labour market open to all, for modernizing work organization and for reconciling work and family life.
- The core of the 'Turku message' signals the need to develop multi-disciplinary and co-ordinated approaches which addresses all aspects of the ageing workforce: education, health, training, social protection, equal opportunities. This demands attention to work organisation and the work environment and not least to the human resources of the workers themselves. There is a clear need to co-ordinate different policy approaches in order to meet the paramount goal of maintaining or even raising the workability of an ageing workforce.
- Systematic co-ordination of relevant actors is required at both enterprise and public policy levels. Firstly, investment in an ageing workforce demands co-ordinated public policies as demonstrated by the Finnish Programme for Ageing Workers 1998-2002. In particular this refers to training and education, labour market, health, social, pension and economy policies. At enterprise level, examples of successful age-management, presented at the Turku Conference, highlight the necessity of various measures, such as time adjustment, to be used as a tool to enable vocational training, or linking workplace (re)design with health protection. Actions of this kind must be based on co-operation between personnel managers, superiors, works councils, the older workers themselves and other key actors involved, such as occupational health services and safety personnel and, where necessary, also the local community.
- The conference clearly indicated the need for worker involvement from the beginning, not only as 'experts in their own matters' but also in realising integrated actions on the enterprise level. Little knowledge is available about successful worker participation. However, worker participation should be real, not only formal. This relates to both the enterprise and public policy levels. Trade unions and works councils represent the workers' interests; however these representative bodies are not widespread in small and medium size companies or in lines of business with a high proportion of female workers.
- Design of integrated policy approaches must systematically take into account the interrelations between the world of work and the private life of the ageing workforce. A

holistic perspective should be developed which informs both public policies and workplace measures. There are significant features of demographic and societal change that routinely influence work issues. As a consequence, solutions to new or growing concerns are required, e.g. better reconciliation of work and eldercare or lifelong learning approaches which do not solely aim to improve vocational skills.

- The need for close relationships between public and workplace policies was constantly emphasised. However, there is also a need to link enterprise actions with systematic and efficient use of official and voluntary local services. Evidently, there is a need for demonstration and evaluation of practice in this sort of local integration. This concerns not only workplace-based initiatives but also community measures such as those which support reconciliation of work and family or other private needs and measures for training, or preparation for voluntary activities.

Preconditions

- To respond adequately to the challenge posed by an ageing workforce, diversity at different levels must be systematically recognised. There are differences in needs between various groups of workers (e.g. immigrant workers, more and less-skilled workers, more and less formally educated, non-educated, gender and age-cohort differences, workers in stable employment and the unemployed, workers in big companies versus those in small and medium size companies). Furthermore, there are contextual differences between the European Member States, due to different cultural backgrounds, legislative framework conditions like the existing social security system or the structure of services as developed historically and politically. As a consequence, 'standard solutions' applicable everywhere will be impossible. Therefore, 'good practices' normally serve at the instructive, not the directly implementable, level.
- Further research is necessary to support the development and effective implementation of active and integrated policies. The demographic changes within the workforce will be rapid, so there is a need to monitor very keenly the developments at policy, strategy, local and enterprise levels. Analysis should include attention to the economic consequences on the one hand and the changes in well-being and active participation of the ageing workforce on the other. Special efforts should be made to understand the needs and preferences of an ageing workforce and how these are changing.
- Finally the conference demonstrated that evaluation is difficult and underdeveloped but that it is essential for learning lessons from experiences; it informs effective practice and helps to avoid unintended consequences of public and enterprise policies. Economic evaluation is especially lacking. Evaluation of policies, strategies and programmes must become more systematic, with appropriate mixes of quantitative and qualitative data. There must also be intensified efforts to more effectively communicate the results of evaluation to policy makers at all levels.

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Annex 1

Conference Programme

Active Strategies for an Ageing Workforce

Turku, 12 - 13 August 1999

Thursday 12 August

09:00 Welcome and Introduction

Chair: **Gabrielle Clotuche**, DG V, European Commission

Opening Address: **Markku Lehto**, Ministry of Social Affairs and Health, Finland.

09:20 Keynote Speech

‘Why the ageing workforce demands an active response in public policy’

Alan Walker, University of Sheffield, UK

Commentary: **Peter Hicks**, OECD

11:00 Development and assessment of integrated approaches in the public policies
of Member States

Chair: **Vappu Taipale**, Stakes, Finland

The Finnish Age Programme: **Pertti Sorsa**, Ministry of Labour, Finland

Commentaries:

Carlien Scheele, Ministry of Social Affairs and Employment, Netherlands.

Staffan Marklund, National Working Life Institute, Sweden.

14:30 Active Strategies and their evaluation

Chair: **Matti Salmenperä**, Ministry of Labour, Finland

Active welfare and labour market policies for (re)integration into employment: **Reija Lilja**, Labour Institute for Economic Research, Finland

Commentary: **Bert de Vroom**, University of Twente, The Netherlands

Reorganisation of work and working time: **Gerhard Naegele**, University of Dortmund, Germany (Rapporteur)

Commentary: **Wendy O’Conghaile**, EFILWC

16:40 Maintenance of the employability of older workers

Skills and training: **Sara Rix**, AARP Public Policy Institute, U.S.A.

Health and workability: **Juhani Ilmarinen**, Finnish Institute of Occupational Health, Finland

18:00 Concluding comments by the chairperson

Friday 13 August

09:00 Working Groups

1) Active welfare and labour market policies for (re)integration into employment

a. Measures for reintegration of longer-term unemployed

Chair: **Liz Mestheneos**, Sextant, Greece

Case evaluation: **Marco Maiello**, Consorzio Nazionale della Cooperazione di Solidarieta Sociale, Italy

Commentary: **Francisco Gonzalez**, GEISE, Spain



b. Part-time pensions

Chair: **Gabrielle Clotuche**, EC - DGV

Case evaluation: **Mervi Takala**, Central Pension Security Institute, Finland

Commentary: **Geneviève Reday-Mulvey**, The Geneva Association, Switzerland

2) Reorganisation of work and working time

a. Reconciliation of employment and caring responsibilities

Chair: **Nel van Dijk**, National Age Discrimination Office, Netherlands

Case evaluation: **Monika Reichert**, University of Dortmund, Germany

Commentary: **Giovanni Lamura**, INRCA, Italy

b. Job design

Chair: **Jukka Takala**, ILO

Case evaluation: **Karl Kuhn**, Federal Institute for Occupational Safety and Health, Germany

Commentary: **Bart de Zwart**, Coronel Institute for Occupational and Environmental Health, Netherlands

3) Maintenance of the employability of older workers

a. Education and training for older workers

Chair: **Robin Webster**, Age Action, Ireland

Case evaluation: **Tarja Tikkanen**, Norwegian Institute of Adult Education, Norway

Commentary: **Maria Luisa Mirabile**, IRES, Italy

b. Promotion of workability and health

Chair: **Ulrich Riese**, EASHW, Bilbao, Spain

Case evaluation: **Kaj Husman**, Finnish Institute of Occupational Health, Finland

Commentary: **Richard Wynne**, Work Research Centre, Ireland

12:00 Report back by chairpersons - recommendations for policy

13:30 Perspectives and priorities of the key parties

Chair: **Clive Purkiss**, EFILWC

Workers: **Henri Lourdelle**, ETUC

Employers: **Bernd Heinzemann**, UNICE

European Commission: **José Bustamante**, DGV

NGO: **Marianne Dwarshuis**, Eurolink Age

14:15 Closing session : Improving the prospects for an ageing workforce

Chair : **Clive Purkiss**, EFILWC

Committee of the Regions: **Gordon Keymer**

Ministry of Social Affairs and Health: **Rolf Myhrman**

15:00 Close of conference



Annex 2

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