

ABSTRACTS

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Older workers in a sustainable society

-great needs and great potentials



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A Self-Regulatory Perspective on Associations Between Age Attitudes, Self-Categorization and Emotional Exhaustion

Introduction.

In view of the world-wide graying of the workforce (De Lange, Taris, Jansen, Kompier, Houtman, & Bongers, 2010), we are facing a scenario that presents critical challenges for numerous stakeholders (e.g., politicians, employers, managers, career counselors, and employees) across countries and industries (Alley & Crimmins, 2007). One of these challenges is preventing possible mental health effects of negative age attitudes held by managers and employees themselves (Van der Heijden, De Lange, Demerouti, & Van der Heijde, 2009). Based on earlier social psychological theories [e.g., self-categorization theory of Tajfel (1978)], and life span developmental theory [e.g., Selection Optimization with Compensation (SOC) model of Baltes, Staudinger and Lindenberger (1999)], we want to address the effects of different age-related variables (age attitudes, self-categorization, and regulatory focus) in relation to emotional exhaustion.

More specifically, we want to test whether:

1a. Negative self-reported and supervisor-rated age attitudes, self-categorization with older workers, and a prevention focus are positively related to emotional exhaustion; and

1b. A prevention focus plays a moderating role in the aforementioned associations, such that the negative impact of age attitudes and self-categorization is reduced in case of a higher prevention focus.

Method. 217 Dutch blue- and white collar employees and their 23 managers participated in a study on the attitudes of older workers. 67.3 percent was male, and their calendar age ranged from 21 to 70 years ($M = 53.6$ years, $SD = 9.8$). All included scales revealed good psychometric qualities. In the preliminary analyses we controlled for age, gender, level of education and job tenure.

Results. The results of multiple hierarchical regression analyses revealed positive significant main effects of negative self-reported as well as supervisor-rated age attitudes and prevention focus in relation to emotional exhaustion, but no significant effects of self-categorization were found. Furthermore, prevention focus appeared to play a moderating role in the relationship between age attitudes and emotional exhaustion (reducing the negative impact of age attitudes), yet did not have an effect in case self-categorization was included as the predictor variable.

Discussion. Our results underline the need to incorporate age attitudes, and to add self-regulatory processes into occupational health models. Given the moderating effect of prevention focus, a factor that, in general, appears to increase with age (Baltes, Staudinger, & Lindenberger, 1999), it is important to hypothesize relationships for distinguished age groups. During the presentation we will further discuss theoretical as well as practical implications of the results found.

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Collective labour agreements offer insufficient support for sustainable participation

In The Netherlands collective labour agreements (CLAs), for sectors or individual companies, play a central role in industrial relations. The CLA in the Netherlands is not just a contract that creates a level playing field for companies. The CLA is also a vehicle to implement national and sector labour market policies, like the transformation of early retirement arrangements. And CLAs (can) play an important role in shaping HR-policies at company level and facilitating implementation through sector fund activities. Particularly so in the SME sectors. The CLA is therefore a key instrument in industrial relations at national level, sector level and the level of individual employers and staff.

As in other European countries The Netherlands are confronted with the effects of ageing of the population and globalisation. More people have to work, and people will have to work longer. Maintaining or increasing productivity, workability and employability of workers of all age groups will become a prerequisite for maintaining the present level of wealth and wellbeing. This has been well recognized at the national level and in many sectors of industry. Given the importance of CLAs in The Netherlands Expertisecentrum LEEFTijd started research into the role of CLAs in supporting sustainable participation.

Method

We selected 100 current CLAs (out of a total of 900 CLAs) covering a wide variety of sectors and individual companies that may be seen as representative for the Dutch economy and industrial relations. A framework for analysis to assess whether CLAs support sustainable participation was developed in this research. Social dialogue (at individual and company level), non-discrimination and diversity, life long learning and mobility, work-life balance, health and safety and gradual retirement were defined as the central themes. Furthermore a pro-active and holistic approach and a shared vision of social partners on sustainable participation are seen as key to a successful implementation of the policies. For each of the central themes a checklist of proven effective interventions was developed. The selected 100 CLAs were then checked on the presence of these specific interventions.

Provisional results

At the moment we are as yet not in a position to present results in terms of differences among sectors or between sector CLAs and CLAs for individual companies. More detailed analysis taking these type of differences into account is performed at the moment. However, some general results can already be presented.

Unequal treatment on grounds of age and tenure is still widely present in CLAs in the form of age and tenure related wages, extra leave and reduced working hours for elderly staff, exemptions from overwork and night shifts. Almost 100 % of CLAs contain one or more of such type of measures for elderly staff, which can be seen as classical age management policies that have an excluding effect on elderly jobseekers. These type of measures are seldom imbedded in broader age management policies, like proactive health promotion or health check programmes. The construction sector is the exception in this field. This sector also uses the Work Ability Index tool in its health surveillance programme.

Close to 100 % of CLAs have a paragraph on education and training, generally related to the function performed by employees. In most cases the entitlements are vaguely formulated and there is no guarantee that employees can materialise their entitlement. Coherent and integral employability paragraphs with facilities like career checks, non- work related education and career development are generally lacking. Exceptions to this are some of the company CLAs in the banking and communications sector and some of the sector CLAs in health care sector. Recently in some of the company and sector CLAs, personal employability funds for all generations have been introduced in exchange for the abolition of seniority leave. CLAs in the blue collar workers sectors seldom have a more elaborated employability paragraph. Here again the construction sector is a positive example.

In the area of work-life balance most CLAs have little to offer. Most CLAs reproduce national legislation concerning the combination of work and care. In The Netherlands reconciling work and family life is generally done through part time work and flexible working patterns. This is reflected in equal treatment of part time workers and where possible flexible working times and increasingly so in teleworking facilities. In industrial sectors most work is still dictated by a rigid organization of the work process, leaving little room for working time flexibility and teleworking.

CLAs in general pay little attention to issues like equal treatment and opportunities at work and stimulating diversity at work policies. Only a few sector organisations support the implementation of programmes for equal treatment and diversity. There is however a considerable number of CLAs and sector funds that have initiated studies on workability and employability and age management of (mainly) older staff.

Most CLAs pay some attention to social dialogue, mainly on the individual level between employee and middle management as part of the yearly human resource management cycle. In only a few CLAs social partners have defined an agenda for dialogue between individual employees and management. In less than 25 % of the cases this covers a broad range of topics related to sustainable participation like education and training, career development, work-life balance issues and adjustment of work and working conditions. Less than 10 % of CLAs have an agenda for social dialogue between the employer and workers councils related to sustainable participation.

Conclusions

CLAs are a very dynamic field of research. CLAs are generally adjusted every 1 or 2 years. It is a continuous process of change creating opportunities for social partners at sector level to adjust their policies in reaction to changes in the (inter-)national economy and labour markets. Although the need for sustainable participation policies is widely recognized by social partners only modest progress can be seen in CLAs on this issue. Short term interests, vested interest and the absence of a common view on industrial relations in the future, particularly regarding the responsibilities of the individual employee and the employer for the sustainable participation of staff, hamper real progress in this field. Particularly so in the sectors that are dominated by small and medium sized companies, low education levels and blue collar work.

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Helping the poorest help themselves? Abolishing mandatory retirement in the UK and USA

Introduction

Across industrialised countries concern is growing about the future costs of supporting growing numbers of older people (OECD, 2006a). In this context, the UK government is

encouraging people to work longer and delay taking their state pension(s) (Vickerstaff, 2006); pension reforms also mean that in the longer term people will have to wait until 68 for a state pension. But is it realistic to expect those most in financial need of earnings to work past their mid sixties? This question is particularly pertinent to the UK because employment rights for men and women are negligible after age 65. Qualitative research suggests UK employees do not have the degree of choice over retirement timing assumed by policy; instead line managers often decide whether individuals will be allowed to work beyond 65, based on the perceived needs of the department (Vickerstaff, 2006). Furthermore, OECD (2006b: 74) argues that means-tested benefits, that are lost as a result of working, mean that delaying retirement is a significantly less attractive option [for poorer people].

American policy might be viewed as offering solutions to these potential barriers to employment. In the US access to means tested benefits has been severely restricted, limiting employment disincentives for the poorest. At the same time, US age discrimination legislation without an upper age limit protects people from forced retirement, formally enabling individuals to delay retirement until they have sufficient resources to stop working. Bringing forward a review into the matter, the UK government has strongly hinted that it will follow the US path of outlawing mandatory retirement ages; it argues: Whether they want to boost their income or keep enjoying the autonomy and sense of worth that comes with work, it will be important to allow those who want to, to keep working for longer (DWP, 2009: 9).

The Paper

This paper therefore considers whether adopting a US policy approach in the UK would increase employment of the poorest over 65s and enhance their overall financial position.

To gauge the possible impact of such a policy change we examine employment past 65 in both countries in 2002, a year in which over 65s in both countries could access a normal state pension, and labour market conditions were similar. We use the English Longitudinal Study of Ageing and US Health and Retirement Study, surveys with comparable measures of health, income, and education (Banks et al., 2006: 2037), as well as wealth. The surveys interview people in their fifties upwards alongside their partners; this included large samples of people aged 65 and over in 2002 (5538 in England and 10428 in the USA). Because we focus on 2002, the first year of the ELSA survey, our analysis here is cross-sectional (in any case, longitudinal analysis using the three subsequent waves of data would be limited by the small number of movements into and out employment for the over 65s).

The findings

The evidence here suggests that if the UK moved toward a US self-reliance policy model, cutting back on means tested benefits and strengthening protection from forced retirement, the number of poorer people working would increase. This is based on significantly higher employment rates past age 65 in the USA. In England means tested benefits appear to have discouraged employment for the poorest to a marginal degree. However, given the financial consequences of not working, rates of employment amongst the poorest Americans were low, especially when compared with the wealthiest. The regression analysis presented primarily attributes this to low levels of health and education. Reducing means tested provision and strengthening employment protection in the UK would therefore be likely to damage the overall financial position of the poorest, in exchange for improving the employment rates of a

relatively small number of poorer people with good health and reasonable levels of education. Such a conclusion is supported by the fact that poverty rates amongst older people were higher in the USA than the UK in the early 2000s (Smeeding and Sandström, 2005: 18). Poverty rates are high amongst older people in the United Kingdom too, but a US policy approach is not the answer.

The paper concludes by arguing that outlawing mandatory retirement ages in the United Kingdom would enhance choice over retirement timing for many and therefore be a positive move. However, such a move should not be framed in terms of dealing with low retirement incomes, as it was in the US, because those in most financial need of employment usually have least ability to work.

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Age-related Factors in the Motivation to Work

In the near future, the workforces of many developed countries will increasingly consist of older workers (UN, 2007). Although few studies focus on the work motivation of older workers (Kanfer & Ackerman, 2004; Rhodes, 1983; Warr, 2001), a recent meta-analysis

(Kooij, De Lange, Jansen, Kanfer, & Dikkers, in press) revealed that work-related motives change with calendar age. Growth motives were found to decrease with age, and social and security motives were found to increase with age. However, a number of researchers has suggested that chronological or calendar age may be an insufficient operationalization of age in the work setting (De Lange, Taris, Jansen, Smulders, Houtman, & Kompier, 2006; Kanfer and Ackerman, 2004; Sterns and Doverspike, 1989). They argue that chronological age may serve as a proxy for age-related processes that influence work motivation directly or indirectly, and thus cannot be captured within one single conceptualization.

Therefore, in this paper, we conceptualize age as chronological age (i.e., calendar age), functional age (i.e., health), psychosocial age which refers to self perception of age (i.e., future time perspective (FTP) with a focus on opportunities, FTP with a focus on limitations, and subjective age) and to social perception of age (i.e., relative age), organizational age (i.e., job and organization tenure), and life span age (i.e., life stage) (Sterns & Doverspike, 1989). Furthermore, to examine whether calendar age influences work-related motives directly or via other age-related factors, we examine the associations between these age-related factors and work motivation (i.e., growth, social, security, generativity, and esteem motives).

Based on the life span development theories of Selection, Optimization and Compensation (SOC) (Baltes, Staudinger, & Lindenberger, 1999) and of Socio-Emotional Selectivity (Carstensen, 1995), we hypothesize that social, security and generativity work-related motives increase with age(-related factors), whereas growth and esteem work-related motives decrease with age(-related factors). Further, based on the Socio-Emotional Selectivity Theory, we hypothesize that FTP is particularly important in the relations of calendar age with social, generativity and esteem motives, and based on SOC theory, we hypothesize that health is a particularly important factor in age-related changes in growth, and security motives.

We conducted survey-based research among (N = 420) Dutch health care workers. Calendar age, and job and organization tenure were self-reported in years, subjective age (Do you describe yourself as young, middle-aged or old?), relative age (Do you describe yourself as younger, same age, or older compared to members of your own work group with similar jobs), life stage (Please indicate your family status as living with your parents, living alone without children, living together without children or living alone or together with children), and health (Please rate your health in general as bad, average, good, very good or excellent) were measured with single items. FTP with a focus on opportunities and FTP with a focus on limitations were both measured with the Future Time Perspective Scale (Carstensen & Lang, 1996; e.g., Many opportunities await me in the future, I have the sense that time is running out). Finally, work-related motives were measured with 15 items that asked participants to indicate the importance they attached to certain job features or work outcomes. The five motive categories (i.e., growth, social, security, generativity, and esteem motives) were confirmed with a confirmatory factor analysis. To test our hypotheses, we performed hierarchical regression analyses in which we first entered the control variables, followed by age, and finally the age-related factors.

In line with our hypotheses, we found that esteem and development motives decrease with calendar age, but that this relation is mediated by FTP with a focus on opportunities. Further, we found that security motives increase with bad health and a FTP with a focus on limitations

(both particularly among older workers). Finally, generativity and social motives were found to increase with calendar age. This relation was not influenced by age-related factors. Implications of these results for life span developmental and motivation theories are discussed. In particular, we stress the need to enhance the inclusion of different conceptualizations of aging in work motivation theories.

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Work ability among senior workers (50+) in a construction company

Work in the construction industry is physically demanding, and that may influence the workers health. Musculoskeletal disorders constitute the greatest cause of disability pension in the trade. Moreover, senior construction workers that report lasting health problems, have the largest tendency to retire early. The aim of our study was to analyze factors that may force seniors to retire before the age of normal retirement (67 years, national insurance).

Main questions addressed in this abstract:

- " Is perceived workload exposure related to age?
- " Is neck/shoulder pain related to age?
- " Is muscle strength lower in workers aged 50+ yr?
- " Do shoulder strength and function vary much between workers?
- " Is self-reported workload related to pain and/or muscle strength?

This was a cross-sectional study, screening all employees (n = 90 men) in a construction company for anthropometric data, musculoskeletal pain (Steingrimsdottir 2005) and perceived mechanical work load exposure (Balogh 2001). Muscle strength (e.g. maximal shoulder press using both arms) was measured for 20 young workers aged <30 yr and 20 senior workers aged 50+ yr.

The perceived mechanical work load exposure was similar among young and senior workers, but there were large variations within each age group.

There was no correlation between neck/shoulder pain and neither shoulder strength nor perceived work load. There were more severe cases of neck and shoulder pain among senior workers than among young workers. However, most seniors with weak shoulders also have a low level of neck/shoulder pain. The older workers were weaker in the shoulder-press test, and several seniors were unable to lift more than 15 kg because of inadequate shoulder function.

Seniors with neck/shoulder pain reported low to moderate mechanical exposure. There was thus no relationship between perceived work load and shoulder strength.

Muscle strength in the neck, shoulder and upper back region (shoulder press) decreased by age. Some seniors had poor shoulder performance of unknown cause. There were no relationships between measured muscle strength, reported mechanical exposure, or neck/shoulder pain.

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Demographic change and the business case for engaging older workers in lifelong learning

Background

As with most European countries, Scotlands demographic profile continues to change significantly and, already in some rural areas, one in three adults of working age are aged 50 and over. The ageing workforce phenomenon is projected to continue for the next 20 years, with fewer younger workers and an increasing number of older ones. This challenge requires a major shift in mindset of employers attitudes and perceptions of older workers, as well as changes in attitude towards working in later life by many older workers who possess a wealth of knowledge and experience and may be forced, financially, to work beyond statutory retirement age.

The challenge

During a period of economic downturn, many organisations adopt Early Voluntary Retirement/Redundancy programmes, placing the older workforce in particular at risk of exiting the labour market. Many of these individuals have been employed since leaving formal education with a significant number becoming disengaged from learning throughout their working lives. Support and provision of lifelong learning for older workers is lacking with the vast majority of Scottish government resources directed at younger people under the age of 25. The question is: where does this leave the older worker?

Lifelong learning as a solution

A range of activities have been tested to help provide a vehicle for older workers to re-engage with learning and explore their options in later life. Findings suggest that older workers are keen to learn and develop at a later stage in life with many willing to explore new areas of interest. While some consider pursuing areas of personal interest, others actively explore the possibility of changing career direction or are being forced to reconsider the point at which

they retire due to financial circumstances. Lifelong learning is a crucial common denominator in both, with innovative ways to make it more accessible for older workers key.

Realising Your Potential

The Realising Your Potential (RYP) Project has developed a range of innovative methods to assist and encourage older adults to participate in lifelong learning and enhance employability in later life. The project methodology essentially uses a variation of the Double Loop learning model proposed by Argyris and Schön (1978). First, individuals are invited to carry out a personal reflection to help build confidence and self-esteem, before progressing onto a 30-hour learning programme which helps build confidence and motivation for learning, explores preferred learning styles, addresses the challenges of change and provides a platform to explore new interests. Finally, the project is piloting the use of the Finnish concept of workability, which involves encouraging participants to consider their current ability to work as well as ways of improving their future work potential.

Reflections and Conclusion

Many older adults experience significant barriers that affect participation in learning and these become more amplified with age. In addition to issues such as time, cost, perception of relevance and ability, one of the key issues identified is managing change in later life. Evidence suggests there is also a lack of confidence and self-belief, which can be overcome through use of reflective learning and recognising past achievements as a basis for progression. Self-identification of barriers which exist via work ability profiling is an area which requires further field testing and refinement. The project activity has a strong foundation, with action research activity continuing to focus on encouraging older workers to consider working longer and/or postponing retirement. Project funding comes to an end in May 2011.

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Extending Working Life: Individuals' Responses, Attitudes and Practices of Employers in Singapore

Context

In 20 years, Singapore will see an unprecedented rise in the number of older adults. Older adults aged 50 and above constituted 14.5% in 1980. This will increase to 35.4% in 2020. Significantly, four out of ten older adults do not have the minimum sum of about S\$100,000 in their Central Provident Fund, a compulsory saving scheme for their retirement needs, upon reaching 55 years in 2004. For a society that subscribes firmly to the philosophy of self-reliance and personal responsibility, where financial support at a subsistence level will only

be given by the State as a last resort, this is untenable. Hence in recent years, a slew of measures have been introduced to promote the employment and retention of older workers, to ensure adequate financial resources in their retirement. In particular, a re-employment legislation to raise the retirement age from 62 to 65 years by 2012.

Research Aim

The aim of this paper is to examine the responses of individuals with regards to what will make working in later years more attractive for them and compare these responses to what they and employers thought were offered to them. It scrutinizes the data from the Future of Retirement Survey and other studies and consider what these findings might mean for policy-makers, labour market planners and employers, in view of Singapore's plan to promote and extend employment of older adults.

Methodology

Data in this paper is drawn mainly from the Global Ageing Survey on the Future of Retirement 2006. The Survey interviewed more than 21,000 persons aged 18 and above, as well as 6,000 executives in charge of recruitment policy for private-sector employers, in 20 countries and territories across five continents. In Singapore, 1,000 persons aged 18 to 79 (494 males and 506 females) and 300 employers were interviewed.

Employers and individuals were asked questions on the factors that could contribute to making working in later life more attractive. The responses from these two groups were compared. Employers were also asked the reasons why their companies did not do more to attract or retain older workers and whether they perceived older workers as more, less or about the same as younger workers in being expensive, productive, flexible, reliable, loyal etc.

Findings & Implications for Policies & Practice

This study revealed the following useful insights, with implications for policies and practice. To make work more attractive in later years, individual respondents 50 to 59 years old felt that employers could provide much more of the following items than what they were offering: the ability to guide and teach young workers, the opportunity to learn new skills, the ability to undertake less physically demanding work, new kinds of work, an enjoyable and stimulating work place, the opportunity to work fewer hours, the ability to continue earning an income. The last two items were selected most frequently, indicating that those were the items that would make it most attractive for those in this age-group to remain in the workforce. However, many employers thought that they were offering much more than what individuals experienced, except for the opportunity to work fewer hours and the ability to undertake less physically demanding tasks. This could be a result of a genuine lack of awareness of employers, or employers giving socially desirable answers. This may imply a need for greater employer education to enhance awareness of the desires of individuals e.g. learn new skills, to promote employment and retention of older workers. It may also highlight the need to retool and re-design workplaces (so that they could undertake less physically demanding work). The general perception that older workers are "less receptive to training and skills" may not be accurate, as seen from this Study. More research is needed on how older workers learn

(methodologies/environment/format/timings) or wish to learn, and what could enhance training effectiveness and the desire to learn. The findings also suggest the need for better communication between employers and employees. The desire for part-time employment and flexible work arrangement was very evident and should not only be made more readily available, but be institutionalized, as part of the human resource policies of the government, as the largest employer, and companies.

The data further revealed that many stereotypical views of older workers persist, particularly amongst employers. This is supported by the findings of the National Survey on Senior Citizens, where nine in ten older workers reported that one of the difficulties they faced in job search is their age. These are in spite of wide evidence that older workers can be as effective as younger workers. This underscores the need to create greater awareness through more public education, so that employers could harness the abilities, skills and experience of older adults more effectively, and older adults themselves would recognize their own strengths and limitations and be able to optimize their strengths. These would likely enhance employers' willingness to employ older workers. While there is currently some evidence of such efforts, for example, by the Tripartite Alliance for Fair Employment Practices (TAFEP), these would have to be intensified.

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The resource-based view: a theoretical home for older workers

KEY WORDS:

Older workers, resource-based view, diversity, skills shortages

Governments and policy makers throughout the developed world have exhorted employers for almost two decades to discourage early retirement and retain older workers because national economies cannot afford sudden and large increases in social security costs. The economic effect of the baby boomer cohort heading for retirement has long been recognised as having economic consequences which would be difficult to manage. So governments and academics set about attempting to convince business of the necessity of older worker retention. Until the global financial crisis, there was little evidence that workers or employers were responding to this call. The growing literature on older workers (OWs) has been dominated by demographic discussions and popular thought and conjecture. A small number have been case studies and empirical research, particularly in the area of employee retirement intentions and its corollary, the incentives needed to keep OWs at work. As research on this topic increases, there is little theory in the human resources area on which to base the value of older workers and the

reasons to keep them in employment. It can be argued that a case of business value was not being made sufficiently strongly to employers (ironically the youth culture introduced by the baby boomers still predominates) while OWs were still infused with the culture of early retirement.

Record economic growth in Australian organisations to 2008 led to labour and skills shortages. Disparities in workforce planning have been attributed to poor macro policy planning as well as labour market inefficiencies in utilising the skills of older workers. From one perspective, older workers are valued because of superior corporate know-how, mature judgment, lower absenteeism, greater work ethic and reliability and loyalty. Another perspective is that mature workers are no less a source of intellectual, social, and organisational capital than other working groups. Against a background of the resource-based view (RBV), this paper outlines the increased benefits of older worker policies. Surprisingly, very little research has examined older workers from a resource-based view perspective. Combined with superior diversity practices, the discussion illustrates how organisational competitive advantage can be increased through greater older worker participation. A number of relationships are identified and a new conceptual model is introduced.

Labour market policies have not considered older workers as a key resource. The resource-based view of strategy for instance is concerned with improving the competitive advantage of firms by improving a variety of assets (Priem & Butler, 2001; Barney, 1991), not least people assets (Wright, Dunford & Snell, 2001). From a human resource perspective, a firm will achieve greater outputs or resource-based rents and returns from the total human capital pool, particularly when the latter is highly capable. Capabilities are the basis for unique core competencies and sustained competitive advantage (Clardy, 2008). Newbert contends a review of empirical RBV studies indicates capabilities and core competencies contribute significantly to competitive advantage compared with organisational resources only (Newbert, 2007:136). Firms need to turn resources into capabilities. Applying the RBV as a basis for describing the contribution of older workers (i.e. 45 years or more), it can be argued that organisations need superior HRM practices to take advantage of the stock of skills, abilities, knowledge, behaviours, relationships and networks of older workers. While many scholars have acknowledged the importance of the human capital pool (Boxall & Macky, 2009; Wright et al., 2001; Lepak & Snell, 2002; Boxall, 1996), very little research has examined the relationship between the resource-based view and older workers. While some research has examined the relationship between the human capital pool and competitive advantage specifically (e.g. Wright et al., 2001), almost no research has explored these relationships from an older worker perspective. Here, the view is that older workers are a critical component of the human capital pool that in turn contributes to competitive advantage. This paper sets out to achieve three things. First, a theoretical model is developed outlining the relationship between the human capital pool, older workers and competitive advantage. Next, the paper argues that baby boomers are a critical source of labour. The discussion explores why older workers are needed in the workplace beyond the average retirement age of 52 years - 58 for men and 47 for women (Jackson, Walter & Felmingham 2006). The discussion examines scholarly debates supporting calls for older cohorts to remain in employment and/or re-enter employment. Third, as a basis for theory grounding, the discussion argues that organisations are more likely to achieve increased competitive advantage when older worker policies are an important aspect of age-neutral diversity strategies (e.g. Selby Smith, Smith and Smith 2007).

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Work life and work conditions of older taxi drivers in Sao Paulo city

Taxi drivers are exposed to not so good work environment conditions during work journey. Depending on how workers have the capacity to take care of themselves, the stressors will not be an obstacle to have a long career in this area. This study discuss work life and work conditions of older taxi drivers in Sao Paulo city Brazil with the objective of identifying the socio-demographic profile, life style, self-referred stress level and current work ability. A

cross-sectional study was conducted and the sample included 100 male taxi drivers from different areas of Sao Paulo city, in Brazil and they were interviewed during the work journey. A questionnaire with socio-demographic, life-style, health and work aspects, living and work conditions and the Work Ability Index was answered. The age range from 24 to 79 years old, and the mean age was 50.2 years (SD 12.3). They had good educational level and 1/3 had at least 12-13 years at school. One third has been working in this branch for more than 20 years and 42% started working the day before at 6 a.m. The majority was married (86.6%) with kids (88.9%) and part of them helped in house activities (33.8%). Only 1/3 of the sample had normal value of BMI and 23.2% referred tobacco use, what is a high value when compared with other professional groups in Brazil. The main stressors in work environment was long hours journey, heavy traffic, repetitive movements, sitting position, pollution, the extension of work journey, sometimes around 12 hours per day. Statistical analysis was performed in SAS 9.1. The stress self-referred have had a negative correlation with age and the older had low level of stress when compared with young ($p=0.0256$). Correlation was found between the Epworth sleepiness scale and stress level ($p=0.0175$). A negative correlation between current work ability and the age that started the job was found ($p=0.0027$). These data suggest the need for actions that aim health promotion.

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Safety and Health Promotion; taking evidence into practice

Using a systematic review methodology, the health, safety and health promotion needs of older workers (over 50 years was investigated). In the process of the review it was identified that an understanding of age-related physical and psychological changes that had the potential to impact on work was also required; as well as factors that can aid in maintaining health and safety in the workplace.

The results identified an initial 180 papers. The process involved an initial screening of abstracts and titles. Where relevance to the review was unclear from these, the full documents were obtained for review. After screening and data extraction, 60 papers were included within the review; 118 documents were excluded and two books could not be obtained in the timescale. The reasons for exclusion were mainly due to no new data or relevant data within the paper or no intervention.

The review identified that there are a number of age related physical and psychological changes with ageing. However, these changes can be moderated by increased physical

activity, intellectual activity and other lifestyle factors. Sensory abilities are also subject to change but some of these can be accommodated via equipment or workplace adjustments. In reviewing accident data, although older workers are at a reduced risk of accidents they are more at risk of fatal accidents. Ill-health data identifies that although there is an increased risk of developing disease with age, many chronic diseases can be controlled and adjustments put in place in the work environment. A number of intervention studies were identified but few were of high quality. The research suggests that occupational health intervention can reduce the risk of early retirement from the workplace; health promotion interventions are seen as positive by older workers but it is important to ensure equal access to all workers in such promotions. Within the UK there are still a large number of research gaps including the lack of longitudinal research; no further analysis on fatal accidents; understanding of the high prevalence of MSDs and stress and anxiety in older workers; what interventions are going to be effective and occupationally relevant measurements of work capacity for both physical and mental work.

The data gaps identified within the review included a lack of longitudinal or good quality interventional research. There is a clear need for more in-depth analysis of accidents, rehabilitation and return to work for older workers. In terms of occupationally related disease an understanding of the prevalence and possible intervention strategies for the reduction of current self-reported levels of musculoskeletal problems and stress, anxiety and depression. What also appears to be lacking within the research is the use of objective occupationally relevant measures for both physical and mental capacity.

From the review a short guidance document has been produced. This describes physical and psychological changes related to age including capacity, shift work, heat tolerance, working environment and high risk industries. Although there is little good interventional research at the current time the review has identified that further work is required for accident prevention for older workers and that occupational health interventions can reduce the risk of early retirement and sickness absence. For health promotion, occupational health is seen as positive but there is limited evidence on effectiveness at the current time. Barriers have been identified in accessing health promotion including ensuring all age groups are encouraged to take part, maintaining and encouraging attendance and allowing time during the working day to take part.

Although the guidance is currently limited to managing health and safety for older workers there is a clear need to develop guidance and management tools that will place this in the organisational context relevant to human resources, line managers as well as those involved in health and safety. An understanding of the potential impact of age on health, wellbeing and productivity is vital in this process as well as an understanding of the costs of losing experienced workers through ill health or accidents. Thus future research needs to link these factors to reduce discrimination against older workers and allow objective measurement and support for continued working.

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Elderly workers in physically demanding jobs: how do they manage?

Background

Work in the construction industry is physically demanding and influence the workers physical resources. The construction industry is the second largest branch for disability retirement for the workers >60 yr old, mainly because of musculo-skeletal disorders. Senior construction workers that report lasting health problems or feel they are worn out, have the largest tendency to retire early.

Physical ability is normally reduced by age. Many workers with physically demanding tasks assume that they maintain their physical work ability through their work. This may not be correct. If so, elderly workers may be at disadvantage in physically demanding work.

Aim

We have here examined physical ability and demands during work among young and senior construction workers to see whether the demand on senior construction workers may exceed their ability.

Methods

First a survey (questionnaires) was carried out among all employees in a medium-sized construction company (n = 100). Thereafter 40 construction workers (20 above 45 yr, 20 below 30 yr) were tested for muscular strength, cardio-respiratory fitness, and body fatness. Finally, 18 of the older and 12 of the younger workers were followed for 1 h each during their normal work while oxygen uptake and heart rate were measured continuously by automatic analysers.

Results

Having good health / not being worn out was reported as the most important requirement for staying in work to normal age of retirement. Most of the workers stated that the work was medium to very strenuous, that they had demanding working positions and that they had daily handling of tools and equipment weighing 1-45 kg.

The young workers had a higher VO₂-max than the seniors: 53±8 vs. 41±6 ml kg⁻¹ min⁻¹. For both groups the work taxed on average 31% of VO₂-max and 53% of HR-max. Peak loads for a few minutes duration were 54±12% of VO₂-max and 71±9% of HR-max.

Discussion

For both age groups VO₂-max was typical for untrained persons of their age, suggesting that their work did not improve their fitness. During work both groups taxed their aerobic power similarly and equal to the internationally suggested level of 30% of VO₂-max averaged over an 8 h working day. These data suggest that elderly workers, when given the possibility, may adjust the physical demands to a level they can sustain. However, for some unfit seniors the aerobic demand may exceed the proposed upper limit.

Key words

" Older workers

" Construction

" Postures, physical exposure

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To Work or not to Work in an Extended Working Life

INTRODUCTION

In great part of the industrial world the population is increasingly becoming older. This will probably result in changes on the labour market for a great part of the countries. In Sweden 22 per cent are going to be 65 years or older in 2020. The average pension age in Sweden for the ones who are a part of the work force at age 50 is today 63,8 years for male and 62,5 years for female (1). At the same time the remaining average duration of life for a person aged 65 is 17 years for men and 20 years for women (2). This means that the economic maintenance will increase for the society in the length of the demographic change in a close future. It will therefore be important to promote an extended working life if Sweden wants to uphold the welfare state, and it is likely that the pensionable age will be postponed.

The comprehensive aim of this research projects is to examine how to make it possible to be a healthy worker and stay at work until an older age, and how to make the working life more suitable to the elderly.

METHOD AND MATERIAL

The research questions have been examined by two surveys. The sample in the first study is 1.949 employees of 55 years and older in the health care sector (3, 4). The second study examines 905 municipal managers attitudes towards their senior workers (5).

RESULT

Study 1

The first study examines elderly workers attitudes toward their working life (3, 4). The result showed that 55% could work until the age of 65 or over but only 44% wanted to do this. The main factors which affect whether the senior workers could or couldnt work until the age of 65 or above were; the physical and mental work environment, their health, the working pace and working time. The main factors that affect whether senior workers did or did not want to work until the age of 65 or above were; motivation factors like their private economic situation, stimulants and meaningfulness at work, to feel appreciation from the organization, values of knowledge and experience and the possibility to obtain new knowledge irrespective of age.

Study 2

The second study examines managers attitudes toward their elderly workers (5). The first study stated that it was important to the employee to feel positive appreciation and subtended by the head and the organisation if they want to work until an older age, but how were the managers attitude towards the elderly? 41% of the managers indicated that it was important to keep the employees in the organisation until they were 65, but only 14% indicated that it was important to keep the employees until 66 years or above. The managers attitudes towards their elderly employees were based on some stereotypical thinking about elders low capacity, elders inadequate knowledge and elders negative disposition to change. Many managers did not indicate things that will increase the senior workers attitude in a positive direction about an extended working life. It seemed like the managers did not see their own impact and importance to motivate the employees to an extended working life.

CONCLUSIONS

For a great part of the industrial world the middle age increase which results in a demographic change. In a lot of countries this causes a situation where the community needs to promote an extended working life if they want to maintain the welfare state. These studies examine elderly workers attitudes towards the working life, but also managersattitudes towards their elder employees. The result shows that the working life needs to be adjusted to take care of the aging work force. Managers and organizations attitudes to older employees certainly affect why some people are healthy workers and work beyond the age of 65 at the same working places where others give up before they are 55 years old. If the society want more people to work until an older age it is important to work with the managers attitudes to older employees and promote age adjusted organizational circumstances.

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Does extra days off contribute to keeping the seniors at work longer?

Background

The Norwegian Government offers employees over 62 years in certain public services to take 8 to 14 days off per year in addition to the ordinary holidays regulated by law. This mechanism is meant as a senior policy measure to keep older workers at work longer before retirement. This mechanism is not a universal one, but has to be negotiated as a local agreement at each single work place.

This paper presents some results of a study examining to what extent the possibility to take extra days off actually contributes to the seniors decision to keep working instead of retiring.

Method

The sample for the investigation is based on a database containing data on all state employees. Public services with a minimum of 10 seniors were picked out. These services were ranked according to the number of seniors within the workplace. 1621 questionnaires were sent out in a web-survey. The response rate was 64%. Another survey was carried out among the leaders of these services (response rate 77 %).

This was quantitative survey. Results were presented as frequencies and percentages. Cross tables and binary logistic regression were used to analyze relation between the variables. To measure the significance level we used the Chi-square test ($p < 0,05$). The results from the binary logistic regression shows the odds rate (OR) and the confidence interval of 95%.

Results

Who are the seniors?

There were equally as many men as women that replied to the survey. Most of them were 62-64 years of age and were married or common-law partners. A large majority reported that they were in good health. A large majority also worked full time and held a university or university college degree.

Most seniors in the sample were very satisfied with their work environment and their job tasks and felt that they handled the tasks well. 50% of the seniors always looked forward to going to work. Most of them wanted to retire at 65 to 69 years of age. Compared with the inhabitants at large this was later than usual. The main motivating subjective factors to stay at work longer were wage increase, reduced time at work and leaders telling them that they were needed.

The respondents with the highest level of education in our sample were less inclined to prioritize the extra days off. These people very often also claimed that the type of work they were doing to a large degree prevented them from actually making use of the extra days off. Those that actually prioritized the extra days off tended to have relatively lower levels of education. Many claimed that the extra days off contributed to their well being at work and increased flexibility.

What effect did the possibility to take days off have on the choice of the seniors to keep on working?

To take extra days off was more important to women than to men. It was also more important to those who worked full time compared to those who worked part time. Neither health nor work environment impacted on whether the days off for seniors mattered to their decision to stay at work or retire. The possibility to take days off were more important to those that considered to continue working, even though they were entitled to a retirement pension, than to those that did not. The extra days of were of greater value to the seniors who had a dialog with their leaders pertaining to the extra days off. In which part of the country the seniors worked also impacted on the effect of the extra days off.

The leaders

Most of the personnel managers worked within big public services and almost all of them stated that they had a senior policy. To some extent the personnel managers felt that the extra days of could contribute to keeping the seniors, but most of them did not rank these extra days

off as one of the three most important measures as opposed to the seniors themselves, which ranked them amongst the three most important measures.

Conclusion

Neither health nor work environment impacted on the dependent variable the seniors choice to keep on working longer than their pensioning age. This is unusual compared to other research. We believe that the reason might be that the seniors with bad health already quit work life in our panel. It might therefore be that the capable seniors of good health are those that are still at work.

Education did not impact on the seniors perception of the importance of the extra days off. This might be due to our sample which is characterized by a special type of workers and of work-places that need highly competent staff, like universities and university colleges.

The extra days off were more important to those who had good dialog to their leader about how they were to use these extra days. This might indicate that communication and signaling interest contribute to keeping the seniors at work.

Libby Brooke

Productivity and the ageing body: Occupational processes and age stereotypes

Introduction

To date the intersection between the ageing body, age discrimination and occupational processes has received scant attention. In particular, the question of how organisational views of productivity interact with stereotypic views of age-related decline warrants further attention in organisational environments.

The paper examines how age relations in workplaces are informed by the biopsychosocial view of declining capacity and the visible signs of the ageing body as the basis of negative age-stereotypes (Achenbach 2008: 23; Bytheway 2005: 339; Calasanti 2005). It builds on Calasanti's views of ageism as containing exclusionary processes, 'Ageism includes categorization, stereotyping, and prejudice, but the most crucial aspect is exclusionary behaviour' (2005: 8). Following Calasanti, the paper proposes that ageism is founded in age relations and distinctions between people that are 'old' and 'not old' and is embedded in "normal" procedures or behaving in taken-for-granted ways (that) can exclude old people...' (p. 8). Applied to workplaces, this view of ageism links biological and social constructions of ageing, age relations and organisational processes of exclusion.

Objectives

The overall objective of this paper is to examine the relationship between perspectives of the productivity of the ageing body, age relations in occupational processes and age discrimination.

Specifically the paper asks:

1. How do organisations conceptualise the ageing life course including psychological, chronological and biological ageing?
2. What is the relationship between perceptions of the declining ageing body and occupational trajectories, including occupational health processes?
3. What processes do organisations utilise to protect against threats to productivity from ageing workforces?
4. What systemic evidence exists which reveals the extent of discrimination in occupational health?
5. What is the response at the public policy level including equal opportunity and occupational health jurisdictions to identified processes affecting the sustainability of ageing workforces?
6. What measures can be taken to counter age discrimination in occupational processes, including occupational health?

Methods

Firstly, the primary method used to examine these issues drew on qualitative data collected among four Australian employing organizations in the 'Redesigning Work for an Ageing Society' project funded by the Australian Research Council (2006-2009). The four organizations were: an Australian branch of a multinational manufacturing firm where 10 key informants were interviewed from the middle and upper management levels; two freight terminals of an international airline yielding a total of 32 key informants from various levels of the organization; a small national university with locations across three states, comprising a total of 15 participants representing various faculties and administrative bodies; and a roadside assistance branch of a motoring organization where 15 participants were interviewed, including occupational health, human resources and patrol staff.

Secondly, quantitative survey of these four organisations (a total of around 1600 employees) was reviewed to assess items which capture more institutional forms of age discrimination in organisations (eg being excluded from work meetings).

Thirdly, a policy consultation was undertaken with senior executives in government equal opportunity and workers compensation jurisdictions.

Results

A number of 'taken-for-granted' occupational processes based in exclusionary age relations were identified. Firstly, in the discourse around deployment of employees within organisations, the ageing body was associated with reduced capacities and hence productivity, which enabled employers to rationalise older workers' career plateaux and descent. Secondly, within workplaces the practice of attributing injury rates to chronological ageing led to older workers' deployment to marginalized positions and their replacement by younger workers. Thirdly, negative views of older workers' capacities to maintain employment led to their marginalisation from productive activity, thus positioning them at transitional points to exit from workplaces. These age-linked organisational paths were founded in biopsychosocial

assumptions which led to exclusionary occupational processes. The quantitative data analysis reveal other nuanced occupational processes, beyond standard discrimination categories, for example, being left out of meetings and ignored by colleagues.

Conclusions

Standardized reports on age discrimination collected by government equal opportunity authorities commonly present data on age discrimination in employment using static categorizations of recruitment, retention and exit. The results suggest revisions of static categorizations to reveal subtle processes of interactive age relations which permeate and structure organisational practices.

From a public policy perspective, governments need to respond to individuals beyond static age-group stereotypes and categories and perceptions of older workers as posing inevitable organizational problems. Ilmarinen notes the need for recognition of individual differences rather than group identifications, despite significant differences in life expectancy, illnesses and accidents between occupational groups (Ilmarinen, 2005: 1050). Yet countering negative age stereotypes fundamentally requires active policies which support health, competencies and enhance age capacities across all age groups. It is only through incorporating life course approaches towards age relations that non-discriminatory and non-exclusionary environments can prevail.

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Older Workers as a vulnerable workforce

This paper will focus on older workers in Australia, New Zealand and the United Kingdom. The purpose is to identify those characteristics which may lead to the older workforce being

categorised as a vulnerable workforce, resulting in disproportionate disadvantages for those at work and for those seeking work. This group of workers suffer from discrimination on the basis of their age despite legislative protection. Here we aim to identify those issues that are common to this workforce and which lead to adverse consequences.

The research questions to be asked, within a comparative context, are:

- (1) Do older workers constitute a vulnerable workforce?
- (2) What are the detriments suffered by older workers in this context?
- (3) What evidence exists to show that the detriments suffered by older workers in this context are different to those suffered by workers in other age groups?
- (4) What statutory and other measures are needed to lessen the detriment suffered?

The context in which this study takes place is that, as a result of demographic change, an increasing proportion of the workforce in all three countries will be classified as older workers. The average age of this workforce is also likely to increase as a result of individuals having a longer active life and the removal of a mandatory retirement age in Australia and New Zealand (and its likely removal in the UK in the near future). There have been studies of those in precarious work which have identified older workers as one of those groups which may be vulnerable to disadvantage. This study will focus on identifying the characteristics of the older workforce which leads to increased vulnerability.

27. Will not be presented – withdrawn:

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Removing economic obstacles to living longer and working longer

Retirement benefits from the public sector and retirement products from the private sector have been created to accommodate population with different characteristics than the population that is about to start receiving them. The major changes in population that affect those retirement products are:

- " Increased longevity,
- " Global workplace competition,
- " Multiple careers,
- " Changing nature of employment due to technological changes.

In this new global economy, workers end up working in several different jobs, or having different careers with one employer, or having unexpected periods of unemployment, training or retraining. Yet retirement benefits and products do not reflect that.

In this work, we point out certain obstacles workers face when dealing with these new challenges:

" Retirement products are age-based and generally encourage retirement at a certain age.

" Tax systems generally discourage simultaneous work and retirement, and are at best indifferent to combinations of work and education, or education and retirement.

" Tax rates, benefits rates, and incentives of social insurance systems are not longevity-indexed, while the real economy effectively is.

In particular, in this new economy, not only a period of retirement is expanded, so is the period of training and education. The two periods are effectively treated and separate and completely unrelated, but economically they are linked and should be linked in both public and private financial systems.

Additionally, unemployment, illness, and disability financial systems, are separated from the retirement system. But there are valid and important reasons for integration of them with retirement and education.

What we propose is working towards integration of all pieces of the financial system to implement the following incentives:

" It should become possible to borrow retirement benefits/funds for education and retraining.

" Extension of length of employment should be encouraged by both tax systems and private retirement systems, not just through defined contribution pension systems, but also by defined benefit pension systems.

" Retirement combined with unemployment should be treated as a different type of state than retirement combined with disability, and different financial benefits/products may need to be developed for those states.

" Effective tax rates should be age-neutral, or even age-regressive in certain situations.

We use a lifetime model from Asset-Liability Integration monograph written by this author in 2002, with addition of longevity improvement, to analyze these proposed changes in financial benefits and products.

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Timing of retirement and mortality - A cohort study of Swedish construction workers

Recent studies indicate that early retirement per se may have a negative effect on health to such an extent that it increases mortality risk. One type of early retirement often referred to in these studies is retirement with disability pension/benefit. Given the overall objective of disability benefit programmes to help the disabled live socially and economically satisfactory lives, freed from exposure to employment health hazards and thus avoid further declines in health the finding is challenging. This paper examined the relationship between timing of retirement and mortality using a cohort of Swedish construction workers. The mortality risk of disability pensioners excluding those with diagnoses normally connected to increased mortality was compared with the risk of those continuing to work. Although initial indications were in line with earlier results, it became obvious that the increased mortality risk of disability pensioners did not depend on early retirement per se but on poor health before early retirement not explicitly recognized in the diagnosis on which the disability pension rested. The results indicate that there are no general differences in mortality depending on timing of retirement. Future studies of mortality differences arising from working or not working must sufficiently control for health selection effects into the studied retirement paths.

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Ageism and discrimination of older workers in Norway

Objectives

The concept of ageism is used in many different ways in the literature. A conceptual analysis done by Iversen, Larsen & Solem (2009) clarifies the dimensions and presents a new definition. The paper will present this definition and exemplify with empirical research on one dimension: explicit negative discrimination of older workers in Norway.

Methods

The empirical part is based upon the Norwegian Senior Policy Barometer for every year from 2003 to 2009. Data for two barometers are collected each year, one barometer for employed persons in general (N= about 1000 each year, summing up to 7016) and one for managers (N= about 750 each year, summing up to 5309). Data are collected on national samples by the marked research institute Synovate for the Centre for Senior Policy.

The questions:

- How often have you had the experience that discrimination takes place in working life, because of a) Gender, b) Age? (very often / often / now and then / seldom / never)

- How often have you had the experience that the following situations happen in working life?
(very often / often / now and then / seldom / never)

- a) Older workers are passed over for appointments and internal recruitments
- b) Older workers are more seldom permitted to attend to courses and training during working hours
- c) Younger workers are preferred when new technology or new working methods are introduced
- d) Older workers receive less wage increase than younger workers

- About how old would a qualified applicant to a position be before you hesitate to call him or her in for an interview, because of age?

The questions ask about the experiences of the respondent, however not about the respondents' experience of being exposed to age discrimination themselves. The main reason for asking indirectly is that we wanted workers and managers to be asked the same questions. And since age discrimination is illegal, questions to managers on how often age discrimination takes place in their company, would be prone to underreporting.

Thus, the questions used are not measuring the prevalence of age discrimination. However, it is possible to compare age discrimination with sex discrimination. The questions also give an indication of the relative prevalence of different types of age discrimination and of possible changes during the study period.

Results

Iversen et al. (2009) refer to twenty-seven different definitions of ageism, which is used in the research literature. The definitions cover, to varying degrees, four dimensions:

- The three classic components of attitudes: the cognitive (stereotypes), affective (prejudice) and behavioral (discrimination),
- positive and negative ageism, - implicit and explicit ageism,
- ageism on micro level (individual), meso level (e.g. intergroup segregation) and on macro level (e.g. legislation on mandatory retirement).

Ageism is defined as negative or positive stereotypes, prejudice and/or discrimination against (or to the advantage of) elderly people on the basis of their chronological age or on the basis of a perception of them as being 'old' or 'elderly'. Ageism can be implicit or explicit and can be expressed on a micro-, meso- or macro-level.

The results from the Norwegian Senior Policy Barometer show only small changes from 2003 to 2009. Changes are statistically significant for managers, but not for the age group of workers susceptible for discrimination, the seniors 55 years and above. In 2009 managers report less age discrimination than in 2003, while the seniors have observed no change. Managers have over the whole period lower estimates than senior workers, of how often they have observed that age discrimination takes place. For example, in 2009 23 per cent of the managers say they at least now and then have experienced that older workers are passed over

for appointments and internal recruitments, compared to 35 per cent of seniors saying the same. For one question, that younger workers are preferred when new technology or new working methods are introduced, managers have more negative estimates than seniors. In 2009, 58 per cent and 52 per cent of managers and seniors respectively report this to happen at least now and then. The difference is small, but probably seniors themselves often have low confidence in their ability to use new technologies.

Conclusions

When studying ageism and age discrimination it is of great value to be clear on what dimensions of ageism are included in the study. The empirical part of this paper study the behavioral part of attitudes; age discrimination, and show small changes over the study period. Managers estimate discrimination of older workers to happen less often than do seniors.

(Further analyses will expand on conclusions)

Per Erik Solem

NOVA
Norway

Have the financial crisis changed managers' attitudes towards older workers

Objectives

Older workers' access to the labour market is influenced by the labour market situation, whether it is in a process of growth or recession. To what extent are managers' opinions of older workers' abilities and their preferences for hiring older workers, influenced by the market situation? The present financial crisis gives an option to study if acute financial recession affects managers' opinions about, and preferences for, older workers and "seniors" in working life. An objective is also to explore the possible differential effects on cognitive, affective and behavioural components of attitudes.

Methods

Data are from the Norwegian Senior Policy Barometer for managers every year from 2003 to 2009 (N= about 750 each year, summing up to 5309). Data are collected on national samples by the marked research institute Synovate for the Centre for Senior Policy. Changes from September 2007 and 2008 to September 2009 are compared to changes from 2003 to 2007/2008. In addition, comparable data are collected on three questions in February 2009. Thus short term (to February 2009) effects of recession are possible to discern from effects on a longer term (to September 2009).

Examples of questions

Opinions (cognitive component)

Workers 50 years and above have just as good work performance as those below 50 (*quite agree / partly agree / neither agree nor disagree / partly disagree / quite disagree*)

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Preferences (affective component)

How well or poorly would you like to recruit the following types of workers? (*very well, fairly well, neither well nor poorly / somewhat poorly / very poorly*)

Seniors, Older workers, Young workers, Experienced workers, Workers with fresh education, and for 2007 – 2009 also: Immigrant workers, Functionally disabled workers

Behaviour potential (behavioural component)

When a company has to downsize, it should be possible to fire older workers before younger workers (*quite agree / partly agree / neither agree nor disagree / partly disagree / quite disagree*)

Do your company have a strategy for how to retain and develop older workers?

(*Yes, we try to retain workers as long as possible, / No, we have no strategy / don't know*)

Results

Positive changes in attitudes toward older workers are connected to positive changes on the labour market with increased demand for labour, including seniors. From 2003/2004 attitudes towards older workers have changed in a positive direction, and employment of older workers has increased. From 2007 or 2008 the attitude changes have stagnated and in some cases a temporal reversal is observed.

The cognitive component

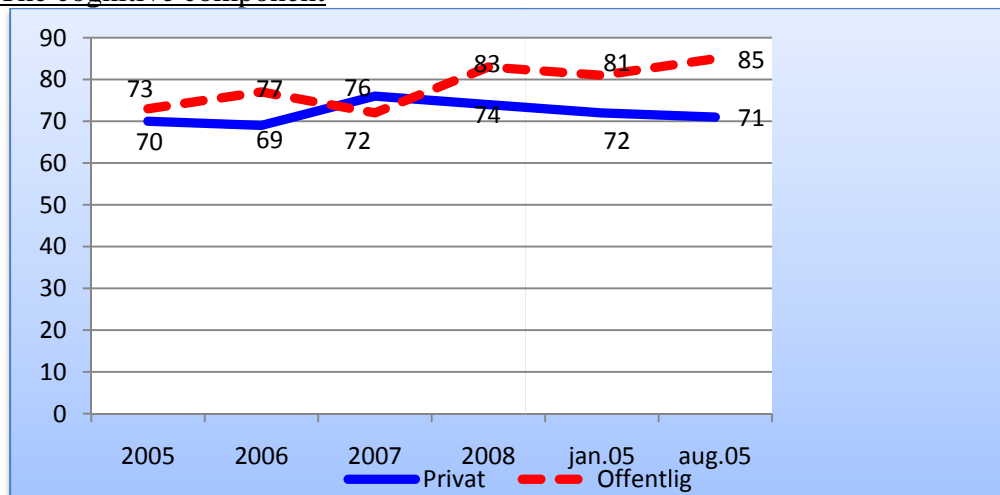


Figure 1. Proportion of managers who “quite agree” that workers 50 years and above have just as good work performance as those below 50. Managers in public and private sector. Per cent (N=4543).

There are only small changes in the cognitive component. However, public managers are growing more positive from 2007 to 2009 ($p < ,05$), while there is an opposite tendency for private managers ($p < ,10$). There seems to be no strong effect of the financial crisis.

The affective component

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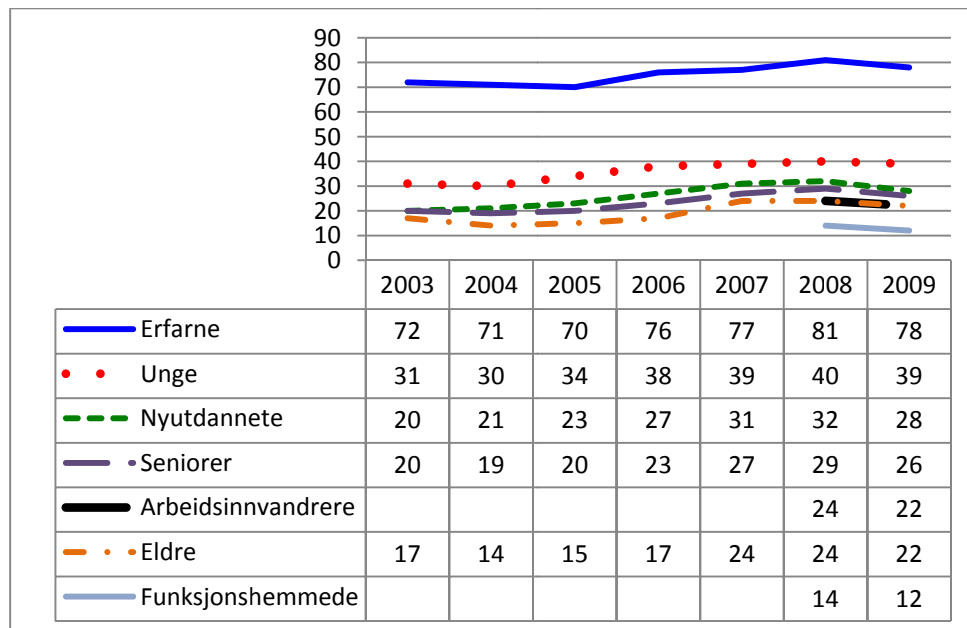


Figure 2. Proportion of managers who very well would like to recruit various groups of workers. Per cent (N=5308).

From 2004/2005 there is a steady and significant increase in managers interest in hiring all the types of workers included in the question. The interest levels off from 2008 to 2009. The patterns are roughly the same in the public and private sector. As the other groups, older workers and seniors have become more attractive (up to 2008), probably as a consequence of a general increase in the demand for labour. However, there are huge differences in the level of interest. Experienced workers (probably conceived of as less than 50 years of age) are the most popular, while older workers are among the least popular, but nevertheless more popular than functionally disabled workers.

The behavioural component

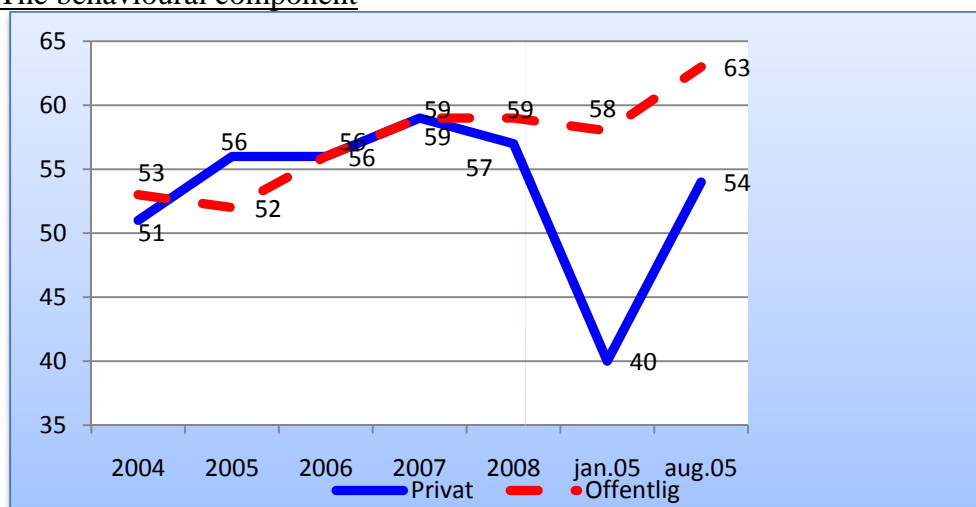


Figure 3. Proportion of managers who quite disagree that when a company has to downsize, it should be possible to fire older workers before younger workers. Public and private sector. Per cent. (N= 5327)

Among managers in the public sector there is a stable high disagreement on firing older workers before younger workers. In private sector managers show a temporary dramatic change. In February 2009 the private managers no longer disagree to the same extent, they are less protective of older workers. But only six months later they have changed back.

Conclusions

When exposed to market forces, as in the private sector more than the public sector, the behavioural component of attitudes towards older workers have changed without corresponding changes in the cognitive or affective components. This may mean that when recession is over, behaviour may change quickly. A solid fundament of positive cognitions about older workers may prevent lasting effects of recession.

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Age, Unemployment and Mental Health

Much research concerned with the psychological impact of joblessness has focussed on the experiences of young people trying to get a first foothold in the labour market. The study reported in this paper draws upon OECD and WHO data for 19 countries and considers the relationship between unemployment and suicide rates over time across the age continuum. Previous research has suggested that on the whole, unemployment has a greater impact on younger people in OECD countries. The present study utilises more modern statistical techniques, namely time series analysis, to test this further. Public policy has tended to focus efforts on combating youth unemployment due to concerns about the long-term impact of prolonged joblessness. In an era when public policy makers are increasingly intent on limiting early retirement in favour of prolonging labour force participation, it is important to thoroughly assess the psychological impact of unemployment on late career workers.

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Working Late and the Growing Spectre of Uselessness

Do firms want older workers? At a time when prolonging working life is a priority of policy makers in many industrialised nations, it is important to consider whether employers seeking to remain competitive in an era of increasing globalization believe they can countenance ageing workforces. This paper, drawing upon data collected from a representative sample of Australian employers, reports findings concerning the extent to which employers are orienting towards older labour at a time of increasing concerns about skill and labour shortages in the Australian economy. While the Australian economy has not been immune to recessionary forces, it is fared remarkably well in the current global downturn. Australia, therefore, acts as a potentially useful case study of the impact of tightening labour supply on the attitudes of employers towards older workers.

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The Ageing Workforce Management Program in Vattenfall AB Nordic, Sweden: Concluding report

Vattenfall AB Nordic experienced a dropping average retirement age. Facing an increase in the average age for the workforce, increased expenses and a shortage of competence and workers were foreseen. Retaining older workers, promoting work ability and transferring competence to facilitate the generation relays became an organisational challenge. In 2001, the Chief Executive Officer (CEO) initiated the Ageing Workforce Management Program by increasing the company retirement pension age to 65 years. Gradually, from 2003 to 2007, additional activities were launched to support the program, and the activities were gradually moved from their project base in the central HR unit to the ordinary line organisation. The activities included seminars raising awareness and motivation for prolonging careers, a special program (80-90-100) reducing the workload of workers aged 58+, age management

leadership training and competence transfer programs. This study is based on a longitudinal study design from 2005 to 2009, employing both examinations by means of a questionnaire study, interviews, observations, data from the company internal surveys on work environment, and sick leave and retirement data from company files. It is concluded that the program was installed and generally well received, but has not fully penetrated the organisation when it the project phase was terminated and the activities integrated into the ordinary company structures and processes. Nevertheless it has succeeded by elevating average pension ages from 58 to 63 years over a seven-year period. Older workers reported generally better or as good work environment profiles as their younger colleagues, and sick leave rates were about the same for those in the 80-90-100 program compared to the company average. Hence it may be concluded that this sharp increase in average pension ages has not been achieved at the costs of the older workers satisfaction and health. The union managers confirmed that the programme has been advantageous for the workers, supporting them to prolong their work careers and facilitating work with impaired health by allowing reduced workload for workers aged 58 years or more (the 80-90-100 program). Over time managers have become slightly more positive in their attitudes towards older workers, but they claim to lack knowledge and clear instructions about age management practices; and they report a slight increase of observed age discrimination. However, the competence transfer programs in the sense of mentorship and double manning did not develop as expected, leadership training were not given to more than a fraction of the managers, and the motivation seminars for older workers did not survive when being part of the ordinary training offered on the internal market of the company. To our knowledge this longitudinal study is the first to report on an in-company age management program implementation. The outcomes have implications for similar attempts on introducing company age management programs although the case study design applied here limits the ability to generalize the conclusions.

Key Words: Ageing workers, age management, age discrimination, motivation seminars, 80-90-100 program, leadership, Vattenfall, Sweden.

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Symposium chairs:

Professor Reidar J. Mykletun and Associate professor Annet de Lange

Special symposium: Age management and leadership issues

It may be argued that, besides the individuals work ability, the leadership qualities including attitudes, values and actual behaviour are the most significant factor in extending older workers job involvement (Ilmarinen, 2009). Unfortunately research on leadership and older workers adaption to work has been sparse, and in response to this, the present symposium is set up to fill in some of the existing gaps. Four different papers will be presented.

The first focus by Annet de Lange addresses correlates of age attitudes, self-categorization and emotional exhaustion, and concludes that negative attitudes towards ageing by leaders and the workers themselves relates to mental health. Theoretically, this link may be causal, which places a heavy burden on those holding negative age attitudes.

The second paper, by Susan P Chen, explores the Survivor-syndrome in an ageing workforce and within a knowledge-based economy in relation to a company merger. With the workforce ageing and the economy shifting to that of a knowledge-based one, organisations need to be more explicit and tactical in its planning and execution of workforce reduction. Management needs to not only communicate the need for change, but also to show the survivors of organisational downsizing that the organisation values knowledge, and possesses relevant processes to support knowledge management. Moreover, management needs to consider policies relevant to the management of an ageing workforce.

The third paper, by Trude Furunes, discusses the actual room that the leaders at a workplace might have to manoeuvre in issues related to age management. This leeway for age management or decision latitudes for age management may be measured by a newly developed scale. The profiles of the five elements in the age management decision latitudes show similarities across organisations, but the latitudes are perceived as wider in private sector companies compared to public sector. The profiles are also almost the same for workers and leaders within the same organisation, although leaders are slightly less positive than the workers.

The forth paper, by Reidar J. Mykletun, present a final report from the Vattenfall Norden AB work on introducing an age management program to raise the average pension age, retain competence and reduce pension costs. This research concludes that the program was successful in these respects, however, it was transferred from the status of a project to fully integrated processes and structures of the organisation before it had fully penetrated the organisation, and indications were found that this transition may have been premature.

Taken together, these papers show the relevance of age management to mental health and competence of the workers, which are central elements in a vital organisation. Moreover the symposium adds to our understanding of the actual decision latitudes of managers and how it may be measured, and ends with a case study research on how successes may be achieved when a company decides to develop age management as part of their leadership portfolio. The symposium adds to existing scientific knowledge and contribute to a better understanding of the practice of leadership and age management in working life.

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Change and choice the baby boomers key to retirement in 2025: a New Zealand Delphi study

Issues likely to influence New Zealand (NZ) baby boomers future retirement, pension, and pension systems, in 2025 were predicted in a modified Delphi Technique research study. Twenty-nine expert panellists from six countries proposed a new definition for retirement; they explored retirement finance, employment, lifestyle and health, and preparedness issues.

The panellists concluded retirement, pensions, and pension systems in 2025 will be more flexible, a staged process from 50-70+ years depending on personal options. Life-work-retirement will be a continuation with transiting in and out of employment, travel and leisure pursuits if planned, educated and saved for. Older people will be valued for their ongoing contribution to society, rather than being taken advantage of due to a younger people skill shortage. Savings, ability, opportunity for paid employment, health, good relationships, community involvement and quality of life will each play a greater role. For a small minority retirement will still mean limited choice, opportunities and control.

New Zealanders currently receive a retirement pension from age 65 years, paid by the government from income tax collected, therefore many individuals believe it is an earned right. The pension is a gender unbiased payment, and previous employment income is not linked. The government has for several years stated the payment criteria may alter (means-tested, age eligibility change, tax level review). The panellists agreed; this implies the individual will need to be more financially independent through savings and employment.

The NZ panellists (NZP) expressed a concern of the lack of knowledge many individuals have presently for their retirement financial needs (basic versus desired lifestyle). Similarly there are assumptions the government will pay the pension regardless of individual choice to spend, and penalise them if they do save. However, individuals are slowly accepting change. Panellists predicted increased peer pressure to save and pay off debt, and a compulsory saving scheme would be accepted.

Retirement preparation roles of the government, employer and individual were predicted. The government role is predicted to be as wanting less responsibility over the longer term. Government would provide policy enabling retirement opportunities, through informed

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decision-making and employment. They would encourage individual motivation to save and a willingness to work longer. They would provide a safety net (very base pension payment) to bail out people who have not saved.

Employers are predicted to become more proactive in older worker retention in times of labour shortages; otherwise employers will have little or no involvement with employee retirement planning. However, older workers will be attracted to and more likely to remain with an employer who offers flexible work arrangements and ongoing training to all employees, and where fitness to do the job is more important than age. Training is predicted to be included in the remuneration package, and full-time work will still be the norm after some designated retirement age for a state pension.

Development of individual lifelong training programmes and training costs will be shared by the government, employer and individual. Cost will be kept as low as possible to enable participation, with government paying about half. Training will be ongoing and viewed by individuals as an investment in their working life. Government incentives for the employer and employees may encourage greater responsibility for ongoing training as global competition for employees and market place demands increase.

Panellists predicted employers will be likely to provide all employees with access to a superannuation scheme and financial budgeting sources, retirement planning seminars, counselling, and retirement activities information. Retirement information will be accessed via online websites, workplace seminars, and pamphlets. The information will be available ongoing for all employees, with encouragement for those over 50years to participate and prepare.

Both panels expressed a concern for the individual. The NZP predicted them as apathetic and therefore needing to be more proactive and responsible. The international panellists (IntP) commented, that, therefore, individuals needed to take more control to know and plan their own retirement needs. Decoupling the pension and retirement age was suggested as a possible outcome, and then the individual would need to take increased responsibility and control.

An individuals current lack of education on retirement preparation was a concern. Both panels predicted the need for less focus on retirement finance and employment and more on lifestyle options. The panellists held concerns for the impact of divorce and separation; impact on single parent families, low paid or minority groups, individual saving ability and the impact on savings with a longer life expectancy.

Both panels agreed retirement preparedness programmes would include information on finance (income, pension, investment, expenditure) health and work-life balance. Additionally included were managing change, attitude to retirement, family, relationships, death, housing, activities, and sources of help.

Choice was the key term panellists repeatedly used throughout the research. The IntP included choice in retirement to work or not; choice to be and how to be physically and mentally fit; choice to update skills; choice of roles to have. The NZP added choice to rethink options.

Work in retirement would need to be redefined and acknowledged as an economic older worker contribution. Retirement work will be varied. For example structured and unstructured paid employment, an independent contractor or unpaid volunteer, having a lifestyle block, undertaking a one off project, agriculture, horticulture, hobbies, writing, painting, running a home business, undertaking family support or having a leisurely life. In other words anything that keeps the retiree motivated and active in society.

Individuals would need a change of mindset, commented the panellists if they are to cope with the changes predicted. Previous generations saved, credit was considerably less available therefore less debt was carried into retirement. Today debt implies the necessity to work longer. While government offer incentives to save and encourage financial education it is the individual who must seek help and act. The panellists acknowledged that some people have no plans and are prepared to live on a basic pension.

The panellists concluded that by 2025 changes to retirement and pensions are likely. Individual baby boomers will prepare and plan the choice of their retirement lifestyle with consideration to successive generations.

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Ageing workers: The jam in the sandwich

Introduction:

Ageing workers are the jam in the intergenerational sandwich. Typically they are not simply isolated individuals, celebrating their affluence by comparison with earlier generations. They retain responsibilities for their children, who may be unable to leave home and be economically self-sufficient. They often have to care for elderly and infirm relations, who live for decades after retirement. In many cases, in a period of economic difficulties, they have lost control over their own personal lives, and their working lives are characterised by uncertainty. They are in transition, between the worlds of work and retirement. They have often felt forgotten, by government and by other groups in society.

With increased life expectancy, age does not have to be regarded as a medical problem. Active ageing regards experience and maturity as a resource, resulting in skill and tacit knowledge, exercised by individuals and collectively, which are greatly valued by organisations. Handled creatively, this is a new and unique resource. Society needs to be reconfigured by its members.

Although demographic change is not the same in each country, across Northern Europe there is widespread and growing concern about the situation of older workers. Industries have been obliged to reorganise, redesigning jobs, and changing policies and practice on recruitment and retention. The European Union has a stated aim of raising employment rates for older workers, ensuring more people work longer. In Norway the Tripartite Agreement on a More Inclusive Work Life (the IA-agreement) has as one of its objective to raise the real retirement age, postponing retirement through efforts at the national and enterprise level.

Norway

In Norway, the Centre for Senior Policy has concentrated on these issues for a number of years, and has developed the concept of “Seniors”. A long term approach can be taken to economic and social development, preparing for working life and communities in the time after “peak oil”. Extending working life, together with effective integration of migrant workers, offers ways forward.

Today in Norway a wide range of measures at the enterprise level, such as bonuses to postpone retirement, reduced workload for older workers without loss of payment, lifelong learning initiatives, reorganization of work to fit the needs of older workers, alternative careers etc., are being extensively used to prevent early retirement.

Although a wide range of measures are used, and evaluated, there are few measures particularly aimed at alleviating the intergenerational squeeze, the jam situation. The concept of seniors being “the jam in the intergenerational sandwich” opens new discussion that has not been a main focus of Norwegian active ageing efforts. By focusing on this challenge we will discuss what kind of measures are currently being used, based on evaluations of active ageing efforts in Norway, and what measures are needed to address the jam situation.

UK

In the UK, alternative approaches to active age are being explored, hampered by limited foundations of research on older workers, which have been acknowledged. Government has accepted arguments from employers that they do not want further regulation, and has limited the resources available for enforcement of current legislation, including provisions of European Employment and Social Policy. State pension ages are being raised, while employers are closing many occupational pension schemes, transforming financial prospects for workers on retirement, and raising questions about the cost of care for the elderly.

Awareness has increased regarding the challenge of intergenerational relations, and the relative affluence and privilege of the “Baby Boomer” generation. Meeting the needs of the current generation of leaders may be at the expense of their children’s generation. Willetts, in “The Pinch” (Atlantic, London 2010), has criticised the impact of individualism, and giving preferential treatment to one's own children. He has recognised that there are Baby Boomers who would like to honour their obligations, adhering to a social contract which spans gaps between the generations. Such Baby Boomers are the jam in the sandwich. They provide the basis for the creation of collaborative advantage. Their skills, experience and tacit knowledge are key ingredients in the new social glue.

To recognise the existence of a problem does not mean that the problem has been solved. Denial continues. It has been compounded by the credit crunch and economic crisis, which have led to increased unemployment, falling income for those depending on savings, and imminent cuts in public spending. Whoever forms the government from 7th May 2010, there will be many policy challenges. As with the financing of higher education, intergenerational

relations and the care of the elderly have been assigned to commissions, to report back after the election. We need to capture the public imagination.

In the USA, the “Tea Party Movement” is beginning to attract criticism for a lack of focus, consistency and rigour. It has provided a route for genteel protest against the economic and social policies of the Obama Presidency.

In the UK we favour a “Jam Sandwich Movement”, or a “Jam and Chutney Movement”, with social events in every constituency, at “Jam and Chutney Houses”, hosted by Seniors. It could be launched by the UK Work Organisation Network, in association with the Poltimore Foundation. The new NGO, comprising and led by Seniors, would raise awareness and facilitate collective action. This will be outlined at the Oslo conference.

A new movement needs to capture the public imagination, and be beyond party politics. The core of the movement will be ageing workers, whose experience and skills provide the necessary social capital, as well as the jam and chutney. Relationships formed in the context of working life can take on a new form in the context of “life after work”. There are new roles for trade unions, whose influence had been declining in recent years, and for partnership with employers and community groups.

Recommendations

We conclude with practical recommendations.

In Norway, programmes for Seniors have built on Action Research in Working Life, and take account of ongoing research supported by the Norwegian Research Council. Lessons learned about the effectiveness of particular policy initiatives need to be identified. They will have international relevance.

In the UK, there has been a shortage of research, and a lack of commitment to government programmes. We have argued for new developments in civil society, including a new intervention. These need to be monitored and analysed, using the criteria of Seniors policy in Norway.

Keywords: Action Research, active ageing, demographic change, intergenerational relations, NGO, Norway, Seniors, UK, Working Life.

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A three phase perspective on senior policies

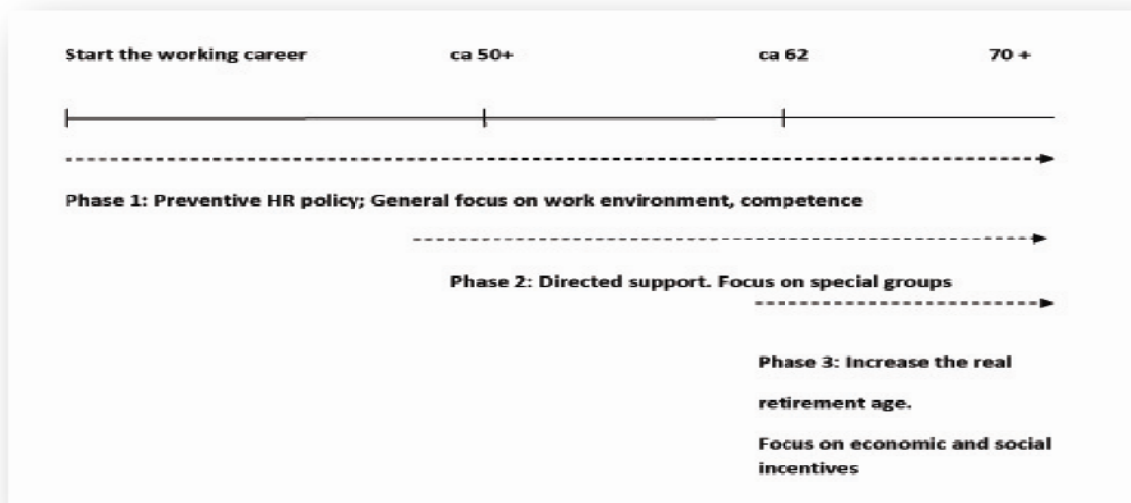
A number of measures to encourage workers to extend their working career have been tried out in Norwegian enterprises over the last decade. Some measures are based on negotiations between employers, employees and the government at national level, some are developed

within certain sectors (e. g. health institutions, schools at county level) and some have been introduced locally at workplaces both in the private and public sector.

There is also an agreement between the main employers' federations, trade unions and the government on inclusive work life where one of the main objectives is to extend the average retirement age by six months.

This paper will present results from six case studies of workplaces where senior policies have been tried out. The cases are; an elementary school, a high school, one unit within the Norwegian Church, a transport company, a hotel and a public control body. The research group interviewed representatives of the management, employees and the unions in each of the cases using both individual interviews and focus groups. The study is also based on written material, including an internal survey-based evaluation of the senior policy measures in one of the case enterprises.

Senior policy is partly ordinary HR-policy, partly resource management, partly a set of preventive measures, partly goal directed support to enable employees to continue working, and partly some economic and social incentives to encourage employees to work on after they reach early retirement age. In the paper we will analyze these factors in a career perspective. The analysis is carried out within the frame of a three-phase model focusing on some critical factors both for the employees and for the enterprise during the span of a work career. The phases start at different times within a career span. They are overlapping, but some are more predominant than others through the career. The figure illustrates the main elements of the model.



Phase 1 Ordinary HR-policies: Work Environment and Competence Management

From day one job content and job demands, work environment and competence management will influence the future career of the employee. The employees are exposed to the universal HR policy and competence management of the enterprise. Some researchers argue that a good senior policy is nothing more than good ordinary HR- policy. At the early phases of a career, this may be correct.

Phase 2. Focus on directed support to specific groups

As employees get older the general HR policy of the enterprise is still crucial for motivation and work performance, but at a certain stage some employees experience a need for more specific support to be able to perform their work at a satisfactory level. At the age of 50 an increasing number of employees are facing some kind of health problems. To what extent such problems will influence the workability will vary from sector to sector and between enterprises. E.g. back problems may be a greater handicap for a person working in the transport sector or nursing home than for a person doing office work. But in all these cases there is a need for some support to make the employees able to continue working at a satisfactory level.

The use of special support measures is part of the general HR-policy in enterprises with a CSR (Corporate Social Responsibility) agenda. It is also possible to get some support from the government to enable workers with special needs to continue working. The interplay between incentives generated in the enterprises and incentives supported by the government is interesting in this phase, and will be discussed in the paper.

One challenge is to assist employees who need some support without stigmatizing them at the same time. The case studies underlined the fear of being stigmatized by some of the older employees.

Phase 3. Increase the real pension age

This phase start when employees come close to the date of decision whether to use existing early retirement schemes or continue working. For some employees (e.g. police) this phase starts at the age of 57, for many others it is 62. The obligatory pension age is 70, but most people have full pension rights at the age of 67. At this stage the aim of the senior policy is to make the job so attractive that it can compete with pension. Focus will change from the support perspective to the use of extra economic and social incentives to keep people working. This is actually what is meant by senior policy within the inclusive work life agreement. At this stage the question in focus of the senior policy is actually turned around from: "How can my employer support "poor me" to cope as a senior worker?" to "What's in it for me?" The implications of this shift of focus at the last stage of the career will be discussed in the paper.

Our study indicates that some employees reach a mental pension age as they approach early retirement age. This has to been taken into consideration when discussing senior policy measures at phase three.

Policy implication

The study shows some signs of a slowdown of the senior policy drive in enterprises that have been involved in senior policy for some time. To reactivate the drive it may be useful to give attention to more specific measures at each stage in addition to ordinary HR measures. Both economic and social incentives are of importance for the decisions of people to extend their working career. The weight of these factors will vary depending on income and socio-economic status of the workers, and of course their total life situation. Therefore, there is a challenge to continue to work out a blend of general measures and some specific measures for specific groups of senior workers.

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Best Agers: using the knowledge and experience of professionals in their primes to foster business and skills development in the Baltic Sea region

With demographic change and the current economic crisis looming, the cities and regions of the Baltic Sea Region (BSR) have to find creative ways of disclosing and utilizing unused opportunities. Among these hidden potentials are the people in the prime of their lives – the so called Best Agers (defined in the project as people aged 55 and older). As previous projects have shown, the BSR population will rapidly become older and the 55+ age groups will experience large growth rates until the year 2020. The result is a pool of older professionals who are healthier than ever, well-educated and motivated and who can be mobilised to counteract the negative effects of demographic change – shrinking regional workforces and the so-called brain drain. So far, this enormous potential has hardly been utilized.

Nineteen partners from eight different countries in the Baltic Sea Region have joint forces to form a cross-generational innovation environment, where Best Agers work together with different age groups in the fields of business and skills development to generate new ideas and share their expertise and experience. Building upon a transsectoral partner structure, capitalizing on the results of earlier projects and existing networks, the partners are analysing the present preconditions and structures regarding Best Agers involvement in regional labour markets as well as in innovation and entrepreneurship activities in the BSR. The project is intended to show how Best Agers can make their contribution in these fields by

- remaining in employment instead of retiring early
- committing their time and energy to voluntary work for the benefit of SME, young entrepreneurs, students and pupils or
- improving their skills and realising their own business ideas.

An early observation in the project is that work participation among older people differs remarkably between Baltic Sea countries, ranging in the age group 55-64 from approximately 30 per cent in Poland to 70 per cent in Sweden (Eurostat). One of the research questions is why this is so? In Sweden, it is found that work participation among older people is hampered by barriers that relate to the individual (competence, health, motivation); these reflect the concept employability. However, there are also barriers that relate to the workplace (flexibility, attitudes) and society (costs for employing older people, access to supplementary education). It is important to identify in each country where the most important barriers are, since they may be prioritised and addressed by political action.

It is recognised that all organisations, but small and medium size companies in particular, would benefit from operational strategies for competence transfer in a generation shift. There are many thousand SMEs in the Baltic Sea countries that may face closure in the next coming

three years since there is nobody who is qualified to take over when key people retire. So it is essential to keep these seniors on the job, but also to find ways to transfer knowledge between generations, making it possible to use older people as mentors the last few years they are active. This requires that programmes for active age management are implemented in the different countries. It has been demonstrated that such programmes if designed properly, can be economically sound and profitable, from the point of view of the individual, for the organisation, and for the society.

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The Gendered and Domestic Context for Retirement

Introduction

In the context, across Europe, of increasing life expectancy and lower fertility rates and the impacts of these on welfare states in terms of pressures on pensions, health and care services there is considerable research and policy interest in better understanding the factors affecting decisions about whether to continue working or to retire. Much of this research focuses on trying to determine the push and pull factors which encourage or discourage extending working life. Although domestic circumstances are widely understood to have an impact on an individual's retirement timing, (for example, the timing of married or cohabiting people's retirement tends to be contingent upon the trajectory their partner is taking Banks and Tetlow, 2008; Johnson, 2009; Vickerstaff et al. 2008; Szinovacz, 1989; Pienta et al, 1994), much of the research and the policy debate frames the issue of retirement timing in terms of individual decision making. Given the well known and relatively profound differences in women and men's experience of paid work it is curious that much of the emerging literature on older workers and extending working life is gender blind. Policy pronouncements on the need to work for longer, delay and save more for retirement typically present their target as the de-gendered and individualised adult worker (see Lewis, 2002 on the adult worker model). The aim of this paper is to examine the gendered and domestic context of retirement and to explore whether we might have a better understanding of retirement behaviour if we theorise it as an embedded set of decisions and aspirations, most usually located in a specific domestic context. The paper begins by reviewing the literature and seeing how the domestic context has been conceptualised in existing research. We then consider empirical data from a qualitative study undertaken in the UK.

The Study

The principal objective of the study was to add to existing knowledge about why people over 50, and more specifically those in the 60-64 age range, have considerably lower rates of

labour market participation than younger groups, with the aim of better understanding what incentives, supports or policy developments might encourage them to continue or return to work. The work was commissioned by the UK Government Department for Work and Pensions. Existing research suggests that the key variables which impact upon individuals withdrawal from paid employment and their willingness or otherwise to return to work are: income and wealth, pension status, domestic circumstances, health, caring responsibilities, benefit status and employer policy in the context of economic and labour market pressures (see for example, Emmerson and Tetlow, 2006; Phillipson and Smith, 2005; Humphrey et al, 2003; Evandrou and Glaser, 2003; Vickerstaff, 2004).

The sample was designed to capture the demographic variables of age, gender, marital status and geographic location, we then included individuals with different labour market status, incomes, pension arrangements, benefit status, health status and caring commitments. The aim was not to choose a sample that was representative of the population as a whole but rather to have sufficient respondents in each of the identified categories to be able to explore the dynamic interaction of the different variables. In total ninety-six people in three locations were interviewed, either as individuals or in couples. An in-depth, semi-structured, qualitative approach was chosen in order to unpick the subtleties of decision-making about continuing to work or to retire.

The Findings

The results, with respect to the impact of gender and the domestic context, are discussed under three headings: finance; health and retirement timing. The findings show that for those individuals in couples plans and ideas about retirement are framed jointly but that womens trajectories were typically contingent on their male partners pathway. In particular, the male partners financial situation and health were key factors in retirement timing. It was also clear, however, that the incentives to continue working, retire or go back into work were clearly gendered, with women and men typically expressing different motivations.

The paper concludes by arguing for a more embedded notion of the individual retirement decision and for re-gendering the notion of the older worker.

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Post-merger downsizing management: Exploring the Survivor-syndrome in an ageing workforce and knowledge-based economy

Although it is acknowledged that downsizing is a frequent organisational intervention that have a differential impact on older and younger workers (Marshall, 1996), most of the research conducted within the area of organisational downsizing and survivor syndrome does not clearly pinpoint age as an independent variable, nor differentiating factors relating to the ageing workforce. Despite a large body of research on downsizing-related survivor syndrome and the ageing workforce, these topics are almost always researched in separate contexts. In response to the gap, this study attempts to integrate both themes and explore the Survivor-syndrome in an ageing workforce and within a knowledge-based economy.

Research from Noer (1993) concludes that there is a need to revisit the idea of post-downsize 'survivor syndrome, as increasingly, terminated employees get to start over, usually after receiving generous compensation and severance benefits. Hence, he observes a potential shift in terms, where those who leave become survivors, and those who stay become victims (Noer, 1993). This study elaborates on Noer's findings and builds on empirical examination of a case study from the merger of two large Norwegian oil companies.

A case study methodology was utilised in this research. More specifically, the research utilised a unique business case of a large Norwegian Oil and Gas company, and its lucrative 2007 post-merger early retirement package, offered to employees over the age of 58. Data were collected by firstly defining the target research sample group, which were highly skilled professionals such as engineers and geologists with more than 15 years of working history with either of the pre-merger companies, and who have accepted the early retirement package. In-depth and semi-structured interviews were conducted with 15 respondents. The semi-structured interview guided the interviewee through present, past and future questions and scenarios. Archival documentation collected through secondary sources was also used, such as the percentage of experts lost through early retirement, and project-specific organizational knowledge management documentation and processes.

Three important conclusions can be derived from this study. First, the findings support the notion of downsizing having differential factors impacting older workers, where the loss of professional and personal networks, as well as knowledge management, are the most crucial factors affecting older workers and their exhibit of survivor syndrome. Perceived transferability of individual knowledge is an important consideration that differentiates older workers in the time of downsizing.

Second, the findings also provide empirical support to Noer's (1993) observations that increasingly, terminated employees get to start over, usually after receiving generous compensation and severance benefits, where those who leave become survivors, and those who stay become victims (Noer, 1993, p. 52). This suggests that organisations cannot overlook the wellbeing of those who survived organisational downsizing, and could consider the use of the Realistic downsize preview model developed by Appelbaum and Donia, (2001), with future considerations of knowledge management.

Lately, the role of knowledge management is critical for organisational success in the ageing workforce and knowledge-based economy. With the workforce ageing and the economy shifting to that of a knowledge-based one, organisations need to be more explicit and tactical in its planning and execution of workforce reduction. Management needs to not only communicate the need for change, but also to show the survivors of organisational downsizing that the organisation values knowledge, and possesses relevant processes to support knowledge management. Moreover, management needs to consider policies relevant to the management of an ageing workforce.

This research will be most relevant to large corporations seeing visible demographic changes in their employees. However, the general application of knowledge management in the time of organizational downsizing will be relevant for most organisations in workforce reduction situations.

As the research is qualitative in its nature, this study also calls for quantitative data investigating the relationships observed in this case. The results from the study enable the opportunity to use quantitative methodologies to test the potential relationships between knowledge management and the perceived impact of Survivor syndrome. A potential hypothesis that could be tested may be the possibility of knowledge management processes prior, during and after downsizing playing a crucial part in influencing ones experience after surviving organisational downsizing, acting as a moderating factor.

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Lifelong learning for job-competence and career extension: The perspective of social partners

The main purpose of the workshop outlined in this abstract is to present findings from a new Nordic survey on social partners policies concerning lifelong learning (LLL) and career development among their senior members (45+). Workforce in the Nordic countries tend to be highly organised especially the older workers. Thus, the union involvement in the discussion of sustainable society and the contribution of lifelong learning to the needs and potential of older workers is crucial. The thinking of continuous learning and the need for a meaningful work has been included in the agreements between the working life parties in all the Nordic countries. However, not all people are provided with or take an advantage of the possibilities to continue their learning as a part of their career development. In 2003 ILO argued that lifelong learning has become the new employment security objective on the agenda of trade unions, as lifelong learning is becoming as important an entitlement for today's employee as the right for a pension became in the past.

However, until recently expanding the job-careers of older workers, has not been on the agenda of the social partners. Traditionally the major focus for the unions has been negotiating shorter working time and early exit pathways. Even if the unions have started to realise the need for options for longer working careers for and among older workers, their activity to promote these options on the grass-root level still tends to be very low. A number of studies show that trade unions are in an especially difficult position regarding these matters, but also that they should develop clearer strategy in response to demographic change, and communicate it to their members.

The purpose of the survey, which was carried out as a part of the work in the small network Older workers in the Nordic countries (OWN), was to find out to what extent the social partners have developed policies and outlined strategies, which explicitly address the demographic change and promote opportunities for lifelong learning and career extension among their senior members. The web-based survey is targeted to the employees and employers confederations (N=25) in five Nordic countries: Denmark, Finland, Iceland, Norway and Sweden. At the point of writing this abstract, the web-survey is still active and data is being collected. The study is a follow-up of the OWN-report Active Learning and

Older workers in a sustainable society

-great needs and great potentials



Ageing at Work: New visions and opportunities for older workers in the Nordic countries (2008). OWN is one of the networks within the Nordic Network for Adult Learning (NVL) supported by the Nordic Council of Ministers. The task of the OWN is to promote discussion on the employability of older workers and the opportunities available for them.

The workshop, which we propose for the conference Older workers in a sustainable society great needs and great potentials, has three goals:

- (i) to present the main findings from the survey,
- (ii) to discuss the findings in the context of each participating country, and
- (iii) to expand this discussion to outside the Nordic countries through involvement of the workshop audience.

The details of and program for the workshop are as follows:

Workshop moderator: Tarja Tikkanen, IRIS, Norway

Timeframe: 90 minutes

Program:

1. Presentation of the main findings - Tarja Tikkanen, Head of Research, IRIS (15 min)
2. Commentary of the results by and for each participating country:
 - a. Denmark Leif Emil Hansen, Associate Professor, University of Roskilde
 - b. Finland Susanna Paloniemi, Senior Researcher, University of Jyvaskyla
 - c. Iceland Bernhardur Gudmundsson, Vice-Chair of Icelandic State Council of Ageing
 - d. Norway Jon K. Sandvik, Senior Advisor, Norwegian Labour and Welfare Organisation (NAV)
 - e. Sweden Hanne Randle, Researcher, University of Karlstad(13 min each)
3. Discussion with the audience (10 min)

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The limits of solidarity. How collectively held values and norms among employees influence the enterprises active ageing policy and practice

Although focus on employer attitudes has increased in trying to explain the lack of engagement in senior policy, and extensive information campaigns have been launched in order to alter unfavourable attitudes among employers, particularly with regard to older employees, it is noteworthy that so far the Norwegian discourse in relation to the IW agreement has paid little attention to the collective system at the workplace, whether this is the trade union structure or the role of colleagues and unwritten collective norms.

In a number of studies conducted over the past years (cf. Halvorsen et al. 2002; Kamp 2003; Midtsundstad 2002, 2005, 2007; Kvåle et al. 2005,; Olsen & Vangstad 2005; Fosslund 2006, Hertzberg and Skinnarland 2007, Olsen and Midtsundstad 2007; Bogen and Midtsundstad 2007, 2010;), we clearly sense that in order to understand the phenomenon of inclusion and exclusion at the workplace, in addition to understanding management and local trade unions policies and strategies and individual choice, we need to understand what role commonly shared values and norms among employees in the organisation play. These studies indicate that there are strong tacit norms among employees regarding what is expected and acceptable behaviour regarding when to retire and when to continue working, as well as who should be entitled to special adjustments in their work situation. These norms seem to influence both the type of active ageing policy initiatives the employer actually chose and, most of all, in which degree theyre actually implemented by the middle managers and are used by the older employees and to which degree it actually influence their retirement behaviour.

On the basis of the above, we distinctly sense the prevalence of collectively held norms about what is a just and fair days work. Further to this we sense that the notions of justness and fairness are based on ideas of sameness, i.e. the more equal the workload or work performance, the more just and fair. Employees who are no longer able to perform up to standard, i.e. within the range which is deemed acceptable by the collective, are no longer as welcome as colleagues; this may explain why many choose to exit. Long tenure in the enterprise may, however, modify this effect (Kamp 2003). But there are also norms counteracting individual assignment of measures based on the assessment of individual needs even though individually tailored measures may be more suitable to enhance a prolonged working carrier.

In an ongoing project, we have been studying how eight enterprises in four different industries (manufacturing, engineering, caring and public administration) with seemingly

good results regarding senior policy have achieved reduced retirement rates. In our paper we present and discuss the results from these studies. In the light of the above discussion, our research questions were:

- 1) Are there commonly shared norms on work performance, cooperation and solidarity in Norwegian work life and do these norms vary between occupations and industries?
- 2) In what way and to what extent do these collective norms influence the formulation and the goals of the senior policy? And in addition to this: How do these norms influence the trade unions strategies towards this senior policy? And how do the workers assess this policy and to which degree do it influence their retirement decisions and actual retirement behavior?

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Managersdecision latitude for age management: Do managers and employees have an implicit understanding?

Introduction/background: In order to put age management into practice, it is important that managers at all levels are involved and think that they can contribute (Ilmarinen, 2009). Previous studies have illustrated how manager decision making latitude in regard to age management practises can be defined and measured across samples (Furunes & Mykletun, 2009). The decision latitude concept is borrowed from Meijman and Mulder (1998), who describe decision latitude as the possibility of control which the situation allows, here used as a measure of how managers perceive their possibility to control age management process and outcome. The four core dimensions of decision latitude on age management identified across samples are access to human and budget resources, possibilities to organise work to meet the demands of ageing workers, and possibilities to unite age management with increasing demands on effectiveness. In workplace surveys (Furunes, Mykletun, Solem, in process), a fifth item also is found to contribute to the understanding of managersdecision latitude on age management, namely the degree of support given from co-workers. The current study surveys both managers and employeesperceptions of manager decision latitude by using the five item scale. Previous studies of this concept open for a comparison of results; however this is the first study employees perception of managersdecision latitude, and the first to compare manager and employee perceptions of the same construct. The aim of the study is to examine the degree of congruence between managersand employees perceptions of decision latitude.

Method: The study draws on data from the mechanical industry, surveying 449 employees and 43 managers. Data were collected by questionnaires. All respondents answered a set of five items concerning managerspossibilities to manage older workers. The five items are developed from management literature (Furunes & Mykletun, 2009) and covered: (1)

possibilities to organise work; (2) available budget resources; (3) available human resources; (4) managers possibilities to unite age management duties into a work schedule with increasing demands for efficiency within the organisation, and (5) support from co-workers. Statements were rated on a scale 1-4, indicating to what degree they agree to the statement. In a factor analysis (Principal Component Factor Analysis, Varimax rotation), the five items loaded on the first factor for both samples. Internal consistency tested by Cronbachs Alpha was .68 for employees, and .74 for managers.

Results: The five item scale for manager decision latitude is valid both for managers and employees. As an overall measure, employees report manager decision latitude to be larger than perceived by the managers. Employees to a stronger degree acknowledge managers possibilities to organise work and to have enough human resources available (86% for employees versus 70 % for managers).

There is a moderate discrepancy between managers and employees ratings when it comes to available budget resources (75% for employees versus 58% for managers). The largest discrepancy is found in ratings of managers possibilities to unite age management duties into a work schedule with increasing demands for efficiency within the organisation. Only 19 percent of managers acknowledge this possibility, compared to 51 percent of employees. Interestingly, managers perceive a higher degree of support from co-workers than rated by the employees (77% for managers versus 64 for employees).

Discussion and conclusion: Employee ratings to some degree follow the same pattern as that of their managers, but the employees are more positive in their evaluations. An implication of this finding may be that employees expect managers to take more action concerning age management than they actually do, as employees see fewer limitations for managers decision latitude. In particular, managers perceive their possibility to unite age management duties into a work schedule with increasing demands to be limited. On the other hand, managers perceive employee support to be higher than rated by the employees themselves.

Comparing the managers in the mechanical industry to the previous studies of other sectors, the scale factor structures were similar but the perception of width of the manager decision latitude varies across the samples. This implies that, although the same dimensions apply across organisations, managers perceptions of width of the of decision latitude for age management differ. Managers in the mechanical industry report wider decision latitudes compared to public hospital and public sector managers. Ratings from mechanical company managers are closer to managers in the energy company. The results may reflect organisational differences when it comes to focusing on age management, as some workplaces have put more effort into introducing age management as a tool to recruit, develop, and retain older workers.

Across studies there is a similarity in some of the item ratings, showing that possibilities to organise work is the most acknowledged possibility measured with this scale. Most managers in public organisations report that lack of human and budget resources limit their decision latitude for age management, whereas half of the respondents in the mechanical industry and the energy company perceive the availability of human and budget resources to be appropriate.

However, one of the dimensions of the age management decision latitude concept is rated at almost the same level across the samples studied here: the perception of possibilities to unite age management with increasing demands for efficiency. The results indicate that managers across organisations either has a pessimistic view regarding the capacity of older workers to contribute to increasing efficiency, or they focus on costs for reducing the load placed on the older workers. It is also noticeable that the workers themselves were more optimistic regarding their older colleagues and the demands for increasing effectiveness than were their managers. This issue is in need for further studies.

Based on the current development of the scale usage, the decision latitude construct seems appropriate for measuring manager decision latitude on age management, and can be used to measure both managers and employees understanding of this phenomenon. Also there seems to be an implicit understanding among managers and employees in the same organisation concerning the shape and width of the decision latitude for age management. Across organisations, similar profiles of the decision latitude were found. This may indicate that these organisations face almost the same structural challenges that limit the decision latitudes. Further studies should apply the concept in other social and economical contexts different from the Scandinavian one to possibly identify other profiles of the items in this measure.

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Working after retirement age. A literature review of its components and its antecedents.

Recent demographic trends demonstrate that in European countries and North-America the population is aging. For organizations this means that within less than a decade their current workforce will retire. Therefore, keeping older workers in the workforce will contribute in filling the future labor shortages. However, a large deal of the present literature on retirement focuses mainly on early retirement, that is, on the process of leaving the organization. Additionally there is some relatively recent literature that is concerned with work participation of elderly workers. Yet, there is still no consensus on why older people remain in the workforce and which type(s) of work continuation (e.g., part-time retirement, full-time work but at a lower level, or etc.) they prefer. This study explores (1) modalities in which older people can continue working after the formal retirement age, and (2) antecedents for the decision to continue working (in a certain modality).

A literature review of personal determinants of early retirement or continuing work, linked to antecedents and results on different types of working after retirement age.

The literature review identified four dimensions of working after retirement age, namely: duration (how the length of the contract is defined), format (type of employee relationship), distribution (distribution of the work) and content (whether the content of the work will change), each containing different options that ultimately shape the type of work one will be involved in.

Examples of antecedents that influence the ultimate choice for the kind of work one will get involved after retirement age are for example organizational commitment, job commitment, organizational satisfaction and job satisfaction. Additionally, non-work factors such as domestic, personal, social and legislative factors also appear important to older workers choice for employment.

The present study demonstrates how psychological factors such as organizational commitment, job commitment, organizational satisfaction and job satisfaction are important factors influencing ones choice for type of employment after retirement age. This is invaluable information for organizations that soon will be facing the labor shortages. It can enable them to influence their workers retirement activities (e.g., encourage them to remain in the workforce), by managing such organizational factors.

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Ageing and the European Labour Market

1. Aims and content of the lecture

The demographic change concludes several challenges, for example the accommodation of employees, which are getting older and often as well the decrease of labour force.

The European Union already tries for many years to react against this trend with the Lisbon-Strategy. One of the main aims of the strategy is to increase the employment-rate of elderly up to 50%, alongside a total rate of 70% and for women of 60%. The first main focus of the lecture will be presenting these political employment aims.

In front of this background the second main focus, the development of these three rates in the European Union as well as in other European countries (such as Norway and perhaps Switzerland) shall be presented, a special attention should be drawn to the development of the rate of the older employees. It has to be stated that there was an important increase of the employment rate of elderly during the last twenty years, and the scandinavian countries are coming in danger to loose the leading position they had over a long period: The actual development during the last years shows that the employment rate of elderly in the European Union (EU 27) further increased with the exception of Denmark, the only country with a decreasing employment of elderly since 2006. At the same time the Danish employment rate of the population aged 25-54 increased from 86.1 to 88 percent. Also Germany and the

Netherlands topped the objective of an employment rate of 50% for elderly as part of the Lisbon Strategy.

As third main focus, clues about the statement of the different employment intensities and structures of the progress within the European countries shall be introduced and discussed. It is to distinguish between

- Tax-based regulations (for example age related wage taxes),
 - Social insurance legal regulations (pension policy),
 - Social and corporate structures (for example the scale of childcare and supporting the employment of women),
- as well as
- Amount and structure of the active labour market policy (for example vocational training, matching, counselling and coaching).

For example the following questions have to be answered:

- put regions or member-states main emphasis on special kinds of intervention?
- Whats the relationship between passive, systematic regulations (tax, social security) and active labour market policy, addressing the individual persons (empowerment, vocational training ...)
- Are there hints for succesful interventions, for success-factors?
- Are there relationships between these governance and the performance of the employment-structures?

2. Context of the Lecture

The lecture will be one result of the INTERREG-Project Demografic Change New Opportunities in an Shrinking Europe - DC NOISE (www.dcnoise.eu). The project, funded by the European Recovery and Development Fund (ERDF) has nine partners in the Netherlands, Belgium, Norway, the United Kingdom (Scotland) and Germany.

As part of DC NOISE the Johann Daniel Lawaetz-Foundation (Hamburg) leads the transnational pilot EU Labour Market policy for elderly. Three newsletters, produced by the promoters of the pilot, with first results, announcements of events and publications are published, see the website.

Main objective of the pilot is to collect national and regional programs and initiatives to increase the employment of elderly, to exchange these approaches and experiences and to summarize the activities and results by developing and disseminating a strategic paper.

3. Methods

The national and regional partners of the project are at the same time correspondents, as experts their task is to look for national and regional programs and to analyse these activities by using a questionnaire developed in advance by the coordinating Lawaetz-Foundation (in cooperation with INBAS, www.inbas.com).

Second approach is the use of always existing, official statistics from EUROSTAT (eg. European Labour Force Survey ELFS) and the OECD.

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Further education in times of demographic change

The labour market is facing new challenges. Due to demographic change we observe on the supply side of the labour market a shrinking and aging labour force.

On the demand side, based on far-reaching structural change, labour is substituted by capital. Consequently, a technology-based economy requires more high-skilled workers.

The changes on the supply side led to adaptations in regulation especially for the pension system. In Germany, the partial retirement will be no longer subsidized after 2010. At the same time, it was decided that the retirement age will be increased stepwise to 67 years. This development raises not only the question if older workers are willing to work but also if they are able to work longer.

For productive aging different factors play an important role. First, it is important to identify the individual work ability. Second, one needs to find out, if the worker is (still) motivated and finally, in times of sectoral change, if he is willing to further educate himself to maintain or even improve his work ability.

Based on a questionnaire developed by the authors and the BiB (Federal Institute for population research) individuals between the ages of 55-64 years were asked if they wish to continue working after reaching the retirement age. In accordance to the work ability index of Ilmarinen, people also had to evaluate their own working ability. Furthermore, a set of questions with respect to motivation and further education was included. The representative poll took place with 1500 employees in May 2008 and was realized by infratest.

A first result was that almost 50% of the respondents claimed to wish to continue working after reaching the official retirement age. The wish correlated with the motivation to work. Although the degree of influence between motivation and an enlarged working life was gender-specific.

Since a high percentage of respondents is willing to continue working, the following paper focuses on willingness to participate in further education programs. First, it is asked in general whether the person is interested to learn something new. Second,, it is analyzed how often

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he/she participated in education programs during the last three years and how much he/she liked it.

In the analysis we try to identify important indicators that might play a role in understanding education behaviour. Apart from objective socio-economic factors we test if subjective measures like motivation, work ability and perceived appraisal have an influence on the education attitude and on the wish to continue working.