State-of-the-art Report

as part of

„AGEADAPT | Adaptation Tools for Ageing Workforce in SMEs" Project

Based on desk research analysis in partner countries and individual in-depth interviews

AGEADAPT project consortium 2022

Table of Contents

Table of Contents 2

1. About the project 3

2. Research context 4

3. Research methodology 5

4. Research findings in Poland 7

4.1. Background situation 7

4.2. Experts' experience in improving age management solutions in SME 11

4.3. Needs to improve age management solutions in SMEs 13

5. Research findings in Germany 14

5.1 Background situation 14

5.2 Experts' experience in improving age management solutions in SMEs 17

5.3 Needs to improve age management solutions in SMEs 19

6. Research findings in Slovenia 20

6.1 Background situation 20

6.2 Experts' experience in improving age management solutions in SMEs 23

6.3 Needs to improve age management solutions 27

7. Research findings in Spain 28

7.1 Background situation 28

7.2 Experts' experience in improving age management solutions in SMEs 29

7.3 Needs to improve age management solutions 30

8. Research findings in the Czech Republic 31

8.1 Background situation 31

8.2 Experts' experience in improving age management solutions in SMEs 35

8.3 Needs to improve age management solutions 35

9. General conclusions 36

1. About the project

The main goal of the project is to create learning materials for two main target groups. Firstly, the small and medium-sized companies (SMEs) that need to prepare for the changing age structure in order not to struggle with their workforce in the near future and secondly, people above age 55 (experienced workers) and their need to update their knowledge in independent usage of digital tools in work life.

The project aims to create a system of educational materials about age management for companies and learning materials for experienced workers aged 55+. The project aims to develop 6 Project Results, A State-of-the-art Report in Partners Countries, Best Practices in Companies' Age Management, Adaptation Guideline for Companies, Inspirational Learning Materials (OERs) for senior employees in form of microlearning units – short educational movies, and textual materials and finally, a Digital Educational Platform gathering all deliverables on one place. The whole system of educational materials will be tested by at least 120 users from the target groups during the Pilot Testing. By doing so, we expect both "sides of one coin" to participate in creating a better workplace for everyone, to start a dialogue and enhance mutual understanding, to create possibilities for increasing personal value as well as value for a company. The project consortium consists of 6 partners from 5 European countries, that is Germany (as an applicant country), Czech Republic, Poland, Slovenia, Spain. The organizations are experts in their respective fields, varying from SMEs associations, adult learning organizations, consultancy experts and similar. By cooperating together, the project aims to deliver innovative educational materials based on different experiences and practices in the area of age management. Moreover, several associated partners are involved in the project as well. Finally, during the project, 3 transnational meetings will be organized as well as 5 multiplier events.

2. Research context

Europe's population continues to age significantly, says the "2018 Ageing Report" prepared by the European Commission's Directorate-General for Economic and Financial Affairs. Although the total population in the EU is projected to increase to 520 million in 2070 (that is 6,5 million more than in 2019), the working population from 55 to 64 years is predicted to decrease to an incredible 41 million.

The aging phenomenon of the workforce, despite the fact that it is caused by various reasons, always leads to the same - all participants of the labor market (employers, employees and business environment institutions) have to adapt to it. Each one of the organizations will have to face these challenges because they are younger, there are fewer and fewer workers and societies are aging. The main goal of the project is therefore to create tools useful for age management and counteracting ageism in the form of didactic materials, a guide and a digital educational platform for two main target groups: owners and managers of SMEs and employees over 50 years of age.

Being aware of the importance and topicality of the issues of age management in the labor market, and thus counteracting age discrimination, the consortium of 5 organizations launched in December 2021 the implementation of the project entitled "ADAPTATION TOOLS FOR AGEING WORKFORCE IN SMES (AGEDAPT)". This project is implemented in the international partnership formula under the Erasmus + initiative.

Assuming that the basis for the development of any management solutions (including those relating to age management) are the results of in-depth research in a given area, the project assumes conducting an extensive research process. This process includes the analysis of secondary data (desk research) and conducting a series of individual in-depth interviews (IDI) regarding the situation of older people on the labor market and solutions in this area, functioning in individual partner countries (Poland, Germany, the Czech Republic, Spain, Slovenia).

3. Research methodology

In order to ensure the highest quality of research and to reduce the measurement error, it becomes fundamental to use triangulation in the following four dimensions:

- data (obtaining data from various sources)
- researcher (conducting research by multiple researchers)
- theoretical (reaching for many theoretical concepts to explain phenomena)
- methodological (combining many research methods)[1].

It is also important to ensure the possibility of comparing the research results to other, similar problems, as well as the reflectivity of researchers and awareness of the methods and expectations used[2].

Chart 1. The research model used in the research process.

Our research was carried out simultaneously in all partner countries of the project in the period December 2021 - April 2022. The research process assumes:

I. Desk Research Analysis performed by each partner in their country. The analysis is to be based on existing data in the form of:
   - available research reports,
   - scientific literature,
   - descriptions of practices in individual countries,
   - experiences from implemented projects,
   - statistical documents, etc., relating to age management in SMEs in partner countries

II. Conducting a series of 3 individual in-depth interviews with experts / consultants dealing with age management / representatives of SMEs, leaders & HR managers, in each partner country. The interviews were semi-structured and conducted on the basis of a previously prepared IDI scenario. This scenario consisted of a series of open-ended questions and in-depth questions, thanks to which it was possible to collect qualitative data on the opinions and experiences of respondents. The selection of the respondents

[1] Denzin N.K. (2017), Sociological Methods: A Sourcebook, Routledge Abingdon–New York.
[2] Glinka B. (2019), Badania jakościowe – analiza danych, prezentacja naukowa. Wydział Zarządzania i Komunikacji Społecznej UJ, Kraków

was deliberate and consisted in inviting people with extensive experience in the subject of age management in organizations to interviews. The average duration of the interview was about 30-40 minutes.

Based on the analysis and interpretation of conclusions from the research process, this "State-of-the-art Report" was created. This document will be the basis for the development of a set of good practices in the field of age management, a guide with a set of practical tools addressed to SME owners and managers, and an educational digital platform in this field.

4. Research findings in Poland

4.1. Background situation

In recent years, the aging of the society has been increasing in Poland. The share of elderly people in the population of Poland is systematically growing. At the end of 2019, the number of people aged 60 and more exceeded 9.7 million and increased by 2.1% compared to the previous year. The percentage of elderly people in the Polish population reached 25.3%[3].

The ongoing changes in the demographic structure of the population, related to the increasing share of older people, pose a challenge for the economy and society. The aging process of the society affects, first of all, the functioning of the health care, social welfare and social security systems, and may also cause problems on the labor market, resulting from the decreasing supply of human resources.

In 2019, compared to the previous year, the professional activity of seniors changed slightly. Among the elderly, the vast majority were economically inactive.

The main reason for the professional inactivity of seniors is receiving a retirement pension. In 2019, among people at the age of 60 and more, it was the reason for not performing and not seeking work in the case of 90.3% women and 85.8% men.

In 2019, the number of economically active seniors increased by 1.5% compared to the previous year and amounted to 1,301,000, which accounted for 7.6% of the total number of economically active Poles aged 15 and more. Despite an increase in the number of economically active elderly people, the economic activity rate of this group of people slightly decreased and amounted to 13.9% (14.0% in 2018).

Among professionally active elderly people, as in previous years, more than two thirds they were men. Their number in 2019 amounted to 880 thousand, i.e. 67.6%. This is due to, inter alia, the later age of retirement of men. Professionally active women in the analyzed group there were 421 thousand of age, ie 32.4% of economically active seniors[4].

One of the most important solutions aimed at retaining mature people in the labor market is promoting the idea of age management among employers.

Age management is a set of activities within enterprises and institutions that allow rational use of human resources, including mature employees. Incorporating age management into the practice of human resource management in an enterprise requires the implementation of specific actions increasing the work efficiency of mature employees, and thus bringing

[3] Sekuła, K. (2021), SYTUACJA OSÓB STARSZYCH W POLSCE – NIEPOKOJĄCY TREND, w: Dziennik Warto wiedzieć, access: https://wartowiedziec.pl/polityka-spoleczna/59834-sytuacja-osob-starszych-w-polsce-niepokojacy-trend

[4] Kamińska Gawryluk, E., (red.), (2021) The situation of older people in Poland in 2019, Urząd Statystyczny w Białymstoku, Główny Urząd Statystyczny.

benefits to companies from their employment. The range of these activities is very wide - they may relate to various phases of the employee's employment (from the recruitment stage to leaving the job); they may refer to the employee himself (mental and physical abilities to perform a given job), but also the employee's environment (work organization shaped by the employer).

According to the European Foundation for the Improvement of Living Conditions and Work, there are eight key dimensions of age management:

1. **Recruitment and selection**

According to the research conducted by the Polish Economic Institute in 2021, identifying the problem of age discrimination in the Polish labor market (which covered the preferences of employers at the level of the initial selection of candidates and the language of published advertisements), the problem of ageism occurs both in the case of offers containing the minimum requirements for candidates, as well as in the case of recruitment processes for positions for which industry experience is required. Younger candidates were much more often invited to the next stage of recruitment. Candidates aged 28 were invited to the next stages of recruitment for positions that did not require specialist experience twice as often as candidates aged 52, regardless of gender. On the other hand, in the case of positions requiring industry experience, the difference in the proportions of positive responses to job applications for women increased and for men it decreased, but still the younger man was invited to the recruitment interview almost twice as often as the older one. Interestingly, ageism seems to be linked to gender-based discrimination, and the combined effects of these two harmful social phenomena make the position of older women in the Polish labor market extremely difficult[5]. There is still little awareness of how the content of job advertisements should be formulated so as not to suggest discrimination against candidates on the basis of age. It also applies to modification of the application forms in such a way that the part available to the people conducting the selection does not contain information that may indicate the age of the candidates, e.g. dates of birth, graduation or first job.

2. **Lifelong learning**

In Poland, most companies claim that older workers have the same access to vocational training like employees of any other age group. Usually there are no limits in access to training and other forms of education organized by the employer[6]. According to the experience of the projects: „PUAP50+", „RESTART" and „Zrozumieć Seniora", it is becoming more and more popular to organize work in a way that is conducive to learning, e.g. creating teams composed

[5] Baszczak, Ł., Mokrzycki, R., Trojanowska, M., Wincewicz-Price, A., Zyzik, R. (2021), Ageizm w Polsce – podsumowanie eksperymentalnego badania terenowego, Working Paper, nr 4, Polski Instytut Ekonomiczny, Warszawa

[6] Kwiatkiewicz, A. (2010) Analiza dobrych praktyk dotyczących zarządzania wiekiem w polskich przedsiębiorstwach – studium przypadku, BPI Polska/Szkoła Główna Handlowa, Warszawa

of employees of different ages (in which case it is possible two-way mentoring - younger employees can share their knowledge with older ones on modern technologies, e.g. IT, while the older ones can share with the younger ones your professional experience). One of the companies, faced with the need to acquire, implement and train new employees, decided on a mentoring program, where the preparation of a new employee for an independent position takes 1.5 years, and during this time he works under the supervision of an experienced employee, usually after the age of 50[7]. It is also common to use the possibility of co-financing training for older workers with EU funds. It is also becoming more common to motivate employees to learn regardless of age – in particular, reassuring older workers that they are not too old for education, and at the same time explaining that they need education because their competences must be there updated.

3. Professional career development

According to the research conducted in Poland, the elderly are often not interested in further education, and at work they value stabilization and even routine. In some cases, belonging to the team which works well is a strong demotivator for further education, e.g. to take up a managerial role. This tendency is characteristic of workers with low qualifications, and even stronger in teams dominated by women[8].

4. Flexible forms of work

Employers in Poland more and more often offer various incentives such as re-scoping duties so that the position becomes more attractive to the worker, more flexible working hours or the possibility of distance work[9]. In one of the surveyed companies, older workers have the option of part-time work and this dimension decreases as the employee approaches retirement until complete non-performance of work just before retirement. In another company, the majority of employees over 50 play the role of internal experts of the company, who are employed on the basis of a fixed-term contract that strictly defines their tasks and working conditions. Depending on the case, the contract is more or less goal-oriented and therefore the working hours are flexible. The scope of duties also includes the role of a mentor, introducing a young engineer, step by step, to the specificity of tasks carried out by the company[10]. It's also common to inform employees about available solutions making working time more flexible.

[7] Litwiński, J., (2010), Opis dobrych praktyk dotyczących zarządzania wiekiem w przedsiębiorstwach polskich oraz innych krajów UE, Warszawa

[8] Kwiatkiewicz, A. (2010) Analiza dobrych praktyk dotyczących zarządzania wiekiem w polskich przedsiębiorstwach – studium przypadku, BPI Polska/Szkoła Główna Handlowa, Warszawa

[9] Raport „Nowe spojrzenie na pracowników 50+" (Manpower)

[10] Litwiński, J., (2010), Opis dobrych praktyk dotyczących zarządzania wiekiem w przedsiębiorstwach polskich oraz innych krajów UE, Warszawa

5. Prevention and health protection

SME companies operating in Poland very often decide to introduce an additional one health prophylaxis. Older workers are encouraged to take advantage of preventive programs in the field of cardiology or a healthy lifestyle. A part of these programs define the tests that employees should undergo. Part of the required health tests are determined by the age of the worker and are designed to prevent development of more serious diseases[11]. In some companies, all employees can purchase at a favorable price a private medical care package or an entry card to sports and recreation centers. According to the PUAP50 + project, many SME companies take care to ensure appropriate conditions in the field of occupational health and safety at individual positions. Companies also take care to ensure ergonomics of work at individual positions.

6. Transfers between workstations

According to the literature, the most frequently observed "adjustment" was moving an employee to another position inside the company at the time when his workplace was liquidated or he was also unable to perform his previous work, e.g. due to health restrictions. Employees were not always satisfied with such a change, even if it was the consequence of a medical certificate. Despite these examples, it is difficult to speak on the planned and conscious management of the movement of workers and the adaptation of places work to the changing needs with age[12]. According to the PUAP50 + project, many SME companies offer support for teams in changes that require personnel changes (transfer, dismissal, changes in the scope of duties). It is also common to create employee teams of different ages (thanks to which the work can be performed by younger people). Very often, however, in the conditions of SME functioning, the transfer of older workers to another position and retraining of employees is a very costly or even impossible process due to the small number of employees and the related organizational problems.

7. Termination of employment and retirement

Based on the conducted research in the project „Z wiekiem na plus - szkolenia dla przedsiębiorstw", it can be concluded that termination of employment is one of the most commonly used activities in relation to older workers. In manufacturing companies, where most of the workplaces require physical effort, two phenomena can be observed: excessive employment and the relative ease of acquiring employees from the external market. Employers seem to have an ingrained pattern that the older worker is always replaced by a

[11] Kwiatkiewicz, A. (2010) Analiza dobrych praktyk dotyczących zarządzania wiekiem w polskich przedsiębiorstwach – studium przypadku, BPI Polska/Szkoła Główna Handlowa, Warszawa

[12] Kwiatkiewicz, A. (2010) Analiza dobrych praktyk dotyczących zarządzania wiekiem w polskich przedsiębiorstwach – studium przypadku, BPI Polska/Szkoła Główna Handlowa, Warszawa

younger worker and that is the natural order of things. Such a belief can be a serious difficulty to implement age management solutions.

8. Comprehensive approach

Usually, in Polish companies, employers decide to implement age management if the organization is aware that there is a problem related to the age of employees, which has or will have a large impact on work efficiency, e.g. when the company is threatened with significant retirement and the inflow of new competent staff is difficult. It has also been observed that in companies that do not perceive such problems at present, there is rarely any interest in human resource management that takes into account the issues of employee age[13]. Few SME companies in Poland apply a well-thought-out comprehensive age management strategy for their employees. However, this is changing, as can be seen from the results of research and activities carried out, for example, under the PUAP50 + or RESTART projects.

4.2. Experts' experience in improving age management solutions in SME

As part of the research, 3 individual in-depth interviews were conducted with:

- The manager of a company that implements projects (co-financed by the European Union) aimed at inclusion of older people in social initiatives and assistance in adapting to the realities of the labor market.
- The owner of a company implementing projects (co-financed by the Provincial Labor Office) aimed at the return to work of older people who have been unemployed for a long time or are retired and would like to take up a job.
- The owner of a company from the SME sector, which employs many people over 55 years of age and conducts activities aimed at adapting these people to the work environment.

When it comes to the experience of experts in the area of age management, our respondents pointed to a very important element of such activities, which concerns the identification and analysis of the competences of older people in the first phases of participation in the project. Persons wishing to take part in the project as beneficiaries, after meeting all formal requirements, are subject to competency tests. This is done in order to best match the capabilities (potential) of older people to the needs of the organization in which they work or intend to find employment.

[13] Dawid – Sawicka, M. (2013), Zarządzanie wiekiem: dobre praktyki polskich organizacji in: https://www.prawo.pl/kadry/zarzadzanie-wiekiem-dobre-praktyki-polskich-organizacji,275659.html

It is, among others, to diagnose skills and prepare a given person to work on a computer, to use digital technologies, to identify what tasks a given person is good at (this applies not to a person's education, but rather to practical skills that the person acquired during his / her professional career). The practical work experience of these people is therefore a very important factor. This is done by means of various types of tests, interviews, and proof of competence. Such research is carried out by experts - recruiters or career counselors specializing in working with the elderly. Thanks to this, it is possible to determine the strengths and weaknesses of these people in terms of professional work, as well as to learn about the expectations and needs of these older people, which should be met by the organizations in which they work or in which they will work. On the basis of this competency analysis, an individual plan for the adaptation of these people to work is prepared and an individual path is determined.

In the case of one of the surveyed consulting organizations, the employment of an older person is preceded by a 3-month professional internship with a future employer (financed from project funds). Therefore, the employer does not pay for the work of these people for 3 months (he/she only pays social and health insurance contributions). After the internship period has expired, the employer is required to hire the person for at least another 3 months (at least half-time), paying the person at least the lowest national salary set annually by the government. Experts of the consulting organization then monitor each internship at the employer's site (structured interviews are conducted with these people and their immediate superiors).

In the case of another consulting company, the adaptation process mainly consists of adapting the workplace to the specific needs of the elderly person. This happens in situations when a given person has a disability or special needs (e.g. a special armchair, a footrest, a specially configured computer monitor screen). This is done in close cooperation with the employer. Occupational health and safety regulations also play a very important role. The adaptation of such a workplace is financed either from the project funds or from the special State Fund for the Rehabilitation of the Disabled – PFRON.

When it comes to solutions that are implemented by owners / managers of companies that already employ older people, our respondents mentioned flexible working hours (shortening the daily working time, remote work - if possible), the possibility of using additional private medical care and transferring older people to positions adapted to their abilities. It is also important to provide older employees with the opportunity to participate in training and development activities, equally accessible for all people, carried out in the organization. Moreover, in the surveyed company, mentoring performed by older, more experienced employees, provided to inexperienced young employees who are just starting work in a given position, is very popular. The representative of the company who was interviewed also added that when it comes to recruiting employees, they try not to distinguish between the younger and the older. The only recruitment criterion is the candidate's level of competence.

4.3. Needs to improve age management solutions in SMEs

When it comes to consulting organizations which deal with age management, a larger number of projects targeting both the elderly and potential employers could help. Financial incentives for potential employers wishing to hire older people would also be useful. System solutions at the level of the entire country or region are also important. New channels of reaching the elderly, who often do not know how to undertake social and professional activities, would also be helpful. They stay at home, do not use the Internet and do not know what the market opportunities are. Unfortunately, it is very difficult.

From the perspective of the consulting organization implementing projects aimed at age management and adaptation of seniors to the labor market, it would be important to make the budgets of these projects more realistic. In Poland (as well as in the rest of Europe) we have high inflation, and the budgets of our projects are limited. It would be nice if there were more competitions and more EU funding to cover more comprehensive and widespread projects. Good, modern tools for assessing the competencies of job candidates, taking into account the age context, would also be useful. Our advisers, career coaches and employment agents have a range of such diagnostic tools, but maybe there are tools on the market that take into account the age criterion. A specially designed training course for employers who want to hire seniors would also be useful. It would also be good to develop a mentoring process scheme to help employers (who have not used mentoring tools before) engage seniors to share their knowledge and experience.

Given the needs of employers, greater financial incentives for hiring older people with disabilities may be useful. Tools for communicating and conducting meetings with employees would also be useful to make the open door policy even more transparent and help us in the daily management of the organization. For example, how to talk to people of different ages, how to adjust to them, how to talk about difficult topics (illness, death, misfortune). Therefore, such coaching help and psychological support would be useful.

5. Research findings in Germany

5.1 Background situation

"Older Employees - Too Young to Be Old." This is the title of one of BIBB's (Federal Institute for Vocational Education Bonn) reports on vocational training.[14] Here one can read how various surveys and statistics show that today's workforce and future generations will remain in the employment system longer and will need to secure, preserve, and help shape their individual ability to work in a longer working life.Neither legally nor scientifically, nor is "the" older employee precisely defined. Current social structures and their prevailing patterns of interpretation, socioeconomic conditions and the spirit of the times help to define who belongs to the older and the elderly. The OECD[15] defines older workers as persons who are in the second half of their working life, have not yet reached retirement/pension age and are healthy and fit for work. In everyday life and in companies most older workers are over 50 years of age. If the employability or the risk of long-term unemployment is taken as a basis, 45-year-olds (also 40-year-olds!) are assigned to the "older group."

According to Eurostat[16], every fifth employee in Germany, i.e., 20 percent, is over 55 years old. This puts Germany above the EU average of 17.1 percent. A chart by Statista[17] (2018) shows that the proportion has increased continuously over the past 20 years by 6.9 percentage points in Germany and 7.5 in all EU countries.

The Institute for Work and Qualifications at the University of Duisburg-Essen states: "If you put the older unemployed in relation to all unemployed, there is a continuous increase between 2005 and 2019 of the share values recognizable. While the share was still 12% in 2005, it has increased to 22% by 2019, and thus almost doubled in 2020. In 2020, however, despite a significant increase in the number of older unemployed, the share of older people in all unemployed fell slightly to 21.5% - an indication that older long-term workers with better protection against dismissal, are less affected by the economic crisis in the wake of the COVID 19 pandemic." (www.sozialpolitik-aktuell.de, Institut Arbeit und Qualifikation der Universität Duisburg-Essen, abbIV77).

An article in the eMagazine "WirtschaftsWoche", published in November 2019, describes the facts about the situation of older workers in Germany as follows:

[14] Published: 2011 by BIBB - Bundesinstitut für Berufsbildung (Federal Institute for Vocational Education and Training), 53142 Bonn

[15] Organization for Economic Co-operation and Development

[16] The Statistical Office of the European Communities. Eurostat is part of the European Commission and is responsible for the production of Community statistics

[17] Statista is a German online portal for statistics that provides data from market and opinion research institutions as well as from the economy and official statistics.

„More and more people in Germany are also working at an advanced age. The number of employees aged 60 and above who are subject to social security contributions has almost tripled since 2007. That year, 903488 employees were aged 60 and above. By 2018, the number had steadily increased to 2609777. As a result, the number of older employees grew faster than the total number of employees. Their share was 3.34 percent in 2007 and 7.93 percent in 2018. In some areas, more than one in ten employees is 60 or older. Last year, the proportion was highest in the area of "Public administration, defense, social security" - namely 12.3 percent of all employees. In the case of education and teaching, it was 10.8 percent, in water supply and waste disposal 10.1 percent. Civil servants are not included in these figures. Other surveys also show that older people are increasingly taking part in working life. Even in a European comparison, the employment rate among older people is above average. 'The tendency of older people to work has increased disproportionately in the last few years compared to the overall tendency to work,' states the BA in a publication on the subject.

Nevertheless, older people continue to have a below-average participation in working life. According to the BA, 21 percent of the population between the ages of 15 and under 65 are not doing any paid work or are not looking for it - this applies to 26 percent of the 55 to under 65-year-olds. […] The labor market policy spokeswoman for the left-wing faction, Sabine Zimmermann, who had made the request, said: 'With the aging of employees, demographic change is also finding its way into companies and administrations.' Age-appropriate work design must therefore also play an increasingly important role. 'The working conditions must be designed in such a way that the employees can survive until retirement age and retire in good health.'

On December 14, 2018, the TÜV Nord Group[18] published on its website the following interesting article on the subject of older employees and digitalization:

"Lifelong learning has become an integral part of the working world. But many employees have mixed feelings about digitalization. This is illustrated by a labor market study carried out by the independent market research institute Lünendonk for the human resources company Orizon. Less than 40 percent of those surveyed aged 50 - 59 said they outweigh the benefits of new digital technologies - compared to 60 percent in the age group 18-29. In day-to-day work, too, it is often the case that older employees have difficulties getting involved in digital change and mastering the challenges that come with it. This in turn makes it difficult for companies to carry out necessary change processes. So, the question for them is what they can do to make things easier."

An article by Annette Vorpahl (09/2019) in the magazine "Faktor A"[19] makes clear that there still seem to exist prejudices against older employees about potential and performance. "At

[18] TÜV Nord AG is an international, independent service company based in Hannover, Germany. The main tasks are examinations and certifications in the business areas of industry, automotive, human resources and education.

[19] Employer magazine published by the Federal Employment Agency, Nürnberg, Germany

the end of 2016, the Institute for Employment Research (IAB) asked placement specialists at employment agencies about the particular difficulties people aged 55 and older have in finding work. Health restrictions were named in first place, followed by insufficient/lack of IT skills. In third place came reservations of any kind on the part of companies toward older people. Less efficient, less motivated, more frequently ill, too expensive, less creative, usually tied to a specific location and inflexibility are common prejudices. […] 48 percent of the placement specialists surveyed are in favor of advising companies to reduce the proven prejudices against older employees and applicants."

Rudolf Kast, owner of the consulting firm KAST.Die Personalmanufaktur, Freiburg, Germany and chairman of the Demography Network (ddn) e.V.[20] comments: "Germany faces a massive aging of its population in the coming years. While this aging can be mitigated by immigration, the shortage of skilled workers cannot. […] One thing is certain: In the next few years, the baby boomer cohorts will retire from the workforce, creating a massive skills gap. Purely due to age, around 6.1 million employees - many of them skilled workers - will leave the labor market by 2030 due to reaching retirement age. In view of this impending skills gap and the parallel megatrends of globalization and rapid technological development - keyword: digitalization - are older workers an option for solving the skills shortage?"

Despite all the skepticism and lack of knowledge that still exist about the performance of older employees, companies will have no choice. Immigration - as already explained - is not the foreseeable solution, nor is increasing the proportion of women in view of the very high part-time ratio of women in Germany.

Many companies already make use of the capacities and skills of older employees, who can still develop their performance potential except in very physically demanding activities. Years ago, BMW manned a production line at its Dingolfing plant with older employees (50 years and older) in a model project entitled "Today for Tomorrow," adapted the framework conditions of work organization and working hours for these employees, and after six months achieved the same productivity ratios as with younger employees. Companies such as Deutsche Telekom, the Otto Group and Bosch offer their employees entering retirement on a voluntary basis to make their expertise temporarily available to the company during retirement. The former specialists and managers are deployed as knowledge brokers in their former tasks or in projects as indispensable temporary experience carriers.

The employment rate of 60- to 64-year-olds in Germany has more than doubled from 21 to 44 percent within a decade. However, health, competence and motivation are important prerequisites for the employability of older people, and employers must invest here. The Janssen company, for example, has developed the "Silverpreneurs" project. Employees over the age of 50 are specifically appointed to projects that are important for the future viability

[20] ddn deals with the working world of the future with special consideration of demographic change, https://demographie-netzwerk.de/

of the company. The message to the inside of the company is clear: older colleagues are valued as knowledge carriers, and at the same time they are trusted with the potential for innovations.

In order to be able to use employees' skills for longer, more and more companies are installing flexible working time systems with long-term accounts. Employees can thus save up time and are given the opportunity to take time off for three to six months, for example, to care for relatives or undergo further training, or they can reduce their working hours for a limited period for recreational purposes. These working time models are offered not only by corporations, but now also by medium-sized companies such as Trumpf, a producer of laser machines, or the sensor manufacturer SICK. But care facilities such as Sozialholding Mönchengladbach also offer their employees these attractive options."[21]

5.2 Experts' experience in improving age management solutions in SMEs

All experts concur in the assessment that age management is still in a very early stage in Germany. Some larger companies have already developed tools and processes, but in SME this is only just a beginning. However, more managers and entrepreneurs are accepting that there is a need for organized and dedicated effort toward older workers since the lack of skilled workers has become omnipresent. Older workers that were mostly deemed a burden 10 years ago are now increasingly seen as an asset companies need to keep and develop.

Age management needs to start early – at the very least around 6-7 years prior to pension age. If workers are approached by their employers too late, their decision to leave the workplace at a certain date is already fixed.

The most important factor mentioned by all experts is appreciation: older workers want to be appreciated (as well as all other workers of course). But for them, the appreciation should not be limited to current or recent accomplishments but should also focus on their life accomplishments. Many of them have been in the company for a very long time and have experienced a lot. SMEs need to make sure that these accomplishments are appreciated in a noticeable way.

Age management is highly individual: the bandwidth of physical and mental abilities as well as of wishes and needs in older employees is much larger than in the younger part of the workforce. There are some workers at pension age that do not have any physical restrictions while others are plagued by multiple problems that highly impact their ability (as well as the

[21] https://faktor-a.arbeitsagentur.de/mitarbeiter-qualifizieren/silverpreneure-mit-vollgas-in-die-letzten-berufsjahre/, 07.03.2022

desire) to work longer. Therefore, everything needs to be very specific – there is no one-size-fits-all solution here.

Some methods that are tested and implemented in age management could benefit all employees regardless of their age: looking for the real needs of the staff, organizing the transfer of knowledge and skills from the older generation to the younger one, establishing healthy conditions in the workplace.

Interestingly, all experts reported that the salary is not the most important factor for the satisfaction of older workers with their employment. This might be totally different for younger workers who have to provide for their family.

The workload can be an issue when there is a demanding work setting like shifts or demanding physical labor. Then a change of the schedule can be very helpful. SMEs have to be creative and flexible here: not only the amount of working hours per week is relevant, but also the beginning and end of the workday or the number of shifts workers have to do in a row.

The option to work from home is not so relevant for older workers as for younger ones. Many of the older employees prefer to come to the office (or the workplace) and value social contacts with co-workers and customers very highly.

A well-designed process of transferring the knowledge of older workers to the younger ones would not only help SME to keep a valuable asset, but also show older employees appreciation. Some companies are establishing a pairing mechanism where an older and a younger worker are coupled to help transfer accumulated knowledge. Interestingly, this is not restricted to the specific professional knowledge of processes, customers and business partners, but could also include the transfer and training of social skills. Many experts report a noticeable lack of these skills among young workers, which is especially harmful in sectors with huge amounts of contact with customers.

Workshops that prepare older workers for retirement could also be helpful. They not only provide valuable information about legal and tax issues connected with retirement, but can also inform older workers about the concrete possibilities for staying in the job. Once again, this is a chance to show appreciation and give employees the impression that they are still needed within the company.

Some SMEs make the mistake of excluding older workers from new projects or the training on new tools, software or processes. This is deemed extremely counterproductive by the experts. Older workers can and do still provide valuable insights and experience.

5.3 Needs to improve age management solutions in SMEs

More information

SMEs wish for more information on age management in general. They are looking for best practices and specific training. A well-defined process that can be adapted to the individual conditions of each company could improve the rate of acceptance of this relatively new area of human resource management.

Many employers and HR-managers wish a dedicated information exchange among them to facilitate the exchange of experiences with age management.

More awareness

Many SMEs have established successful methods to attract young people. The number of apprentices even in sectors that have huge problems in recruiting apprentices like the craft sector, have risen significantly in recent years (albeit still not to a satisfactory level). A lot of energy, ideas and resources are being spent here.

On the other hand, the same companies still are not aware of their human resource potential they have on the other end of the age spectrum. Activities to raise the awareness of the owners and managers of SME would be very helpful.

More tools

SMEs lack the resources (both financial and personal) that large companies usually have. Therefore, a toolbox with proven methods for the prolongation of the employability of older workers will be highly appreciated. Everything should be very clear and easy to use. Specific training offers both for employers and employees would also be considered helpful.

6. Research findings in Slovenia

6.1 Background situation

Slovenia, like elsewhere in Europe, faces major demographic changes. As the older population grows, we are entering a long-lived society, which brings with it major changes in the ratio between age groups. In fact, older people are a particularly vulnerable social group. According to the Statistical Office of the Republic of Slovenia, in October 2019, there were 265,667 people in employment who were 50 years of age or older, which is 7,790 people or 3.0% more than in October 2018. As the life expectancy increases and the technological change in society and the economy accelerates, the understanding of the working life cycle is also changing, which is projected to strengthen in the future.

In the group of European Union countries, Slovenia ranks among the countries with the lowest index according to the active aging index. We belong to the group of countries which, given the low level of inclusion of the elderly in the labor market, is recommended to promote the employment of the elderly among the working population and among those who have already reached retirement age. Similarly, data from the European Commission place us in the group with the lowest share of working elderly people. Employment for the 55-64 age group in Slovenia is 38.5%, while the EU-28 average for 2016 was 55.3%. Only Croatia and Greece have lower employment rates among EU countries in this age group (Eurostat, 2018). This can be understood as a result of early retirement, existing work culture and insufficient incentives to persevere in the workplace.[22]

A number of surveys have been conducted in this area among Slovenian employers, and based on the survey data, it has been shown that Slovenian companies employ an extremely low percentage of the older workforce and that they only slightly employ new workers between the ages of 50 and 64. Older employees, more than other employees, face the following challenges: they are more difficult to report to their younger superiors, more difficult to work with if they are the only ones in the collective of younger employees and physically, older workers feel more pressure in their work than other employees.

There is still a strong belief among employers that older people are less productive and less able to work, which is often not the case. Older people, with their rich experience, which they can pass on to younger workers, certainly represent added value in the company. In addition, they have developed work values, loyalty, expertise, responsibility and reliability. It is often possible to adapt a job to an older employee with just simple measures and enable him or her to carry out his or her work tasks successfully, despite possible limitations that may be the result of aging. In the process of aging, the human body begins to change and gradually begins to slow down the functioning of all organ systems. It is therefore important that employers

[22] Zaposlovanje starejših v Sloveniji, str. 6-7, 2018

are aware of certain specific needs of older people and adapt their jobs to these needs, as their number and share of the workforce will only increase in the future.

Involvement of the elderly in work extension programs

In Slovenia, the employment of older workers is rather low compared to other EU countries. The employment rate in the age group between 50 and 64 is slowly increasing, but mainly at the expense of those under 55. One of the reasons for the low employment of this 53 generation is certainly the tradition of early retirement, and the specific situation on the labor market also contributes a lot to this.

Namely, in this age group:

- it is very difficult to apply for flexible forms of employment,
- older people rarely decide to partially retire,
- companies very rarely resort to new forms of employment that would enable older people to find and keep older workers.

Comprehensive support to companies for active aging of the workforce

The program is implemented by the Public Scholarship, Development, Disability and Maintenance Fund and is implemented in the period 2016 to 2022. Within the program, several activities were carried out aimed at improving the competencies of older employees, supporting employers in introducing measures to extend the work of older people and change attitudes and negative stereotypes about older employees. As part of the project, a catalog of measures for the effective management of older employees was prepared, which serves as a tool for the preparation and implementation of activities and measures in companies. During the project, several public tenders were published, where companies were able to obtain funding for training to strengthen the competencies of older people and funds for the preparation of strategies and plans for effective management of older employees.[23]

Managing older employees and strengthening their competencies

The Ekvilib Institute offers a comprehensive management service for older employees, with the aim of strengthening their competencies and knowledge. The service can also be used by companies that have successfully applied for the project "Comprehensive support to companies for active aging of the workforce".

They offer several services such as:

[23] Javni štipendijski, razvojni, invalidski in preživninski sklad Republike Slovenije, 2016

- preparation of a strategy for effective management of older employees,
- personal plans and workshops for effective management of older employees,
- supervision and group / individual coaching,
- the hidden characteristics of Generation Y - Millennials and how their disclosure significantly improves your quality of life (in the workplace),
- diversity management workshop.[24]

Attitudes towards older employees

The results of a survey conducted by Kapitalska družba and the Institute of Management and Organization at the Faculty of Economics, University of Ljubljana showed that awareness of the issue of aging employees among Slovenian companies is quite present. Companies are particularly aware of the problems that the aging process of the population and consequently the workforce brings to their own company. The result is logical, as for companies it is already today, and in the future it will be, even harder to find a reliable and favorable market position. Therefore, it makes sense to think today about the possible consequences of aging trends (working) population, such as: labor shortages, rising employment costs, problems with retaining knowledge within organizations, certain organizational adjustments to work schemes and also adapting jobs to older people.

The key findings of the elderly management survey were as follows:

- companies in Slovenia are generally aware of the problems that the aging process brings to Slovenian society, Slovenian companies and most of all, to their own company;
- slightly less than half (46%) of companies have a staffing plan for the retirement of their employees; these companies are also more aware than others of the problems posed by the aging process and the consequent increase in the share of older employees; companies with a staffing plan are more likely to be companies with foreign capital than companies with domestic capital, companies with a trade union and works council, and larger companies (over 100 employees); companies that have a staffing plan are considering the introduction of special programs (education, recreation) for older employees more than other companies, but they also have a larger share of older employees in their structure and face the problem of filling vacancies more than other companies; intensively and on their own initiative monitor changes and innovations in the field of pension legislation;
- half (51%) of companies face the problem of filling vacancies; companies operating in the hospitality and manufacturing industry that do not have taken out supplementary pension insurance stand out; these companies are also working harder to retain older employees, and are considering introducing special programs only for older employees;

[24] https://www.ekvilib.org/sl/upravljanje-starejsih-zaposlenih-ter-krepitev-njihovih-kompetenc/

- companies that are domestically owned and have a share of state capital say that they do not have the problem of filling vacancies;
- 29% of companies say that they are trying to retain older employees and that they are implementing various measures for this purpose: redeployment / adjustment of jobs, relieving older workers (easier work tasks), adjusting schedules, taking care of preventive health examinations and additional financial incentives;
- the vast majority of companies (86%) are not considering the introduction of special programs (recreation, education) for older employees; in contrast, the vast majority of companies (78%) know and practice generationally mixed teams, mostly due to the transfer of knowledge from older to younger employees, less due to the relief of older workers.[25]

6.2 Experts' experience in improving age management solutions in SMEs

One of the first steps to creating a national report in Slovenia, was an execution of 3 in-depth interviews. Two companies that were interviewed were SMEs and the third one was a bigger organization. The reason why we include the third one was because of their experiences working on age management for the last 10 years.

As mentioned in-depth interview we include:

- A family business company, with a 40-year tradition, employing 150 workers, including workers over 55 years of age.
- The company MPT d.o.o., which has 56 employees, of which 18 employees are over 45 years old.
- A large company that operates throughout Slovenia through twelve regional units that employ over 2,300 people.

In the first company, most of the staff is employed in jobs to perform simple work and tasks in production and they do not perceive any major problems in adapting older workers to the needs of work. Older workers are considered to be very conscientious, hardworking and responsible. The only problems they perceive are health problems, disability procedures, but also not to such an extent that it would significantly complicate the work process. However, they are aware that the workforce is still aging, so because of that they had recently applied to the public tender of the Slovenian Entrepreneurship Fund "Comprehensive support to companies for active aging of the workforce", from which they obtained funding for educating the elderly in the company. In the next phase, they will select different areas in which to educate older workers. For them the role of management is important, and it is necessary to

[25] Company attitudes to older employees: research report with interpretation of results and recommendations. - Ljubljana: Kapitalska družba.

be aware of and prepare in time for changes that will probably be even more obvious in the future.

So far, they didn't use any specific activities or tools to facilitate the process of adjusting older employees, as they didn't perceive any major problems. From time to time, they organize informal trainings for employees, including the elderly, with the aim of better-quality work. They are well aware that change is not possible overnight. Therefore, they see the advantage in well-timed adaptation to the needs of digitalization. The elderly need to be prepared, encouraged in order to overcome obstacles associated with the fear of failure.

They also had one unsuccessful approach/activity, where employees had the chance to learn the English language, but when it came to realization, the actual inclusion was very low. The reason was that they don't want to educate themselves outside the working hours.

In the second company, the vast majority are employees in lower positions, production operators or assembly operators. The company trains their staff in several segments - directing, production, and all employees for whom the content was related to stress in the workplace, communication in the workplace, difficult communication, etc. The company was involved in the ASI project, where people over 45 years old had a chance for informal education. The experience with the older part of the team is such that they liked to get involved in soft skills programs, while there was not so much interest in professional workshops or digitization programs. Excuses have been made several times: soon I will retire, I don't need this knowledge, etc. Basically, they found out that they weren't interested enough, notwithstanding that the company might have recognized that they would need new knowledge, if nothing else at least to update their existing knowledge. The biggest problem is that people should be approached in different ways, not only through the company, but also through other institutions and country in this idea, so that employees work for as long as they can, of course, under the right conditions.

Back in the past they didn't want to hire older people, say over 50, 55, but nowadays they are dealing with a different situation. Today, they also employ people who are already retired or, for some reason, waiting to work. The role of management in companies in any case, regardless of these projects, is to encourage workers, not just seniors, to stay in the company.

Currently they don't have structured activities or tools to facilitate the process of adjusting older employees. Because of their small size, they are more flexible in dealing with the needs of individuals - meaning everyone, not just the elderly, when they need it. They provide appropriate support to those employees who need it at a given time. However, they have a colleague who takes special care of entertainment activities (eg. on holidays, Valentine's Day - chocolates, apples.) In this context, it is about caring for all employees, not just the elderly.

An example of good practice was involvement of older employees in ASI training (comprehensive support to companies for active aging of the workforce), where older employees were satisfied at the end, despite the initial lack of motivation. On the other hand

older employees who have e.g. certain health problems, they take an individual approach. Workplace adjustments are always possible, so they adjust workplaces within production accordingly or provide appropriate help (help for assistants in lifting loads). Such an approach allows quick response and the introduction of positive changes and means a lot to employees.

Accepted acts such as different informal education, weren't so well accepted among their employees. The educations themselves (including ASI), have not had any great benefits in the short term. Because people, especially in lower jobs, still take these trainings as something that the company wants for them to attend, pass and go home. They don't live it yet. It's true, though, that this needs to become a company culture, so they think that it could be continuous, multiple times.

The last interviewee was one of the biggest insurance companies in Slovenia. They have extensive experience in the field of human resources management, and they have started and established many new projects in the company. They started working in the field of intergenerational cooperation in 2013, because the personnel analysis showed that the share of older employees will increase significantly over the years. At the time, they treated 55+ old workers. In Slovenia, insurance agents have a special profile, which is quite different from the profiles of other employees, because they are subject to specifics, such as field work, independent scheduling of working hours, and the method of reward. In addition, this is a group that is already experiencing or will experience extremely strong changes with digitalization. It is this group of employees that is aging in the company.

Their approach to the age management was very systematic and had started back in 2013 step by step and it's an approach that they are still working on today. The approach itself was made from eight steps, where they put special attention to:

- personnel analysis,
- determining what age groups they have in the work process,
- the establishment of an efficient intergenerational system,
- preparing a set of activities in several areas,
- promote and encourage employees to intergenerational cooperation,
- organizing a series of workshops,
- including all older people in the training in such way as to raise awareness that prolonging work, activity is a necessity that will happen for reasons outside of them,
- education throughout the period.

Besides that, they have some concrete actions such as:

- detailed analysis of the health picture of all employees by age groups,
- health days, during which they prepare a 4-day program every year (1x or 2x), where employees (older people have priority) are provided with an awareness program at the spa about healthy exercise, nutrition, life organization, reconciling private and professional life, giving up unhealthy habits…

- organization of various educations on the topic of movement, healthy lifestyle, on-line exercise, promotional material intended to promote the preservation of health.
- preventing cognitive decline in older employees by encouraging them to attend language courses, even if they do not need foreign language skills in the work process.

One of the main advantages that they pointed out is the willingness of older employees to engage in education is steadily increasing. Their project Triglav.smo (3xZ and everything will be fine - knowledge, health and commitment) has been established, and wants to keep all employees healthy, provide them with the knowledge that they will be able to work and create an environment that they will be committed to (that they will like to come to work and understand each other well). The introduction of activities and methods takes place in a soft way, which encourages intergenerational cooperation and socializing, so they did not detect any weaknesses in the introduction and use of these activities.

The example of their good practice was mixed working groups, formal mentoring for new employees and openness to the involvement of retired former employees. But on the other hand, they were a little disappointed with the development of awareness of the importance of involving older employees. It is crucial that everyone in the company is aware of the importance of demographic change and the importance of appropriate action. There is definitely still an opportunity for development and improvement here, communication is needed, communication and communication again, they said.

The actions are showing good results, as the number of training hours in the group of older employees has increased significantly, which is an indicator of awareness of the need to learn and acquire new skills in older people. They are noticing changes in the treatment of older employees, because what has happened in the environment itself has also changed, which also facilitates their internal business policies and encourages them in some way.

From the very beginning, they have missed systemic changes, although the situation is improving. Employers who employ older workers otherwise receive certain incentives in terms of employment and maintaining the jobs of older workers. It is systematically arranged in such a way that the labor cost of an older worker can be 10% higher than for the employment of a younger one at the expense of the past work allowance. More flexible forms of employment for older workers would be very useful, in this sense, if the health capacity of older workers is reduced in order to provide employers with the means to adapt jobs.

6.3 Needs to improve age management solutions

When it comes to changes, interviewees say that nothing will change until the employed people change. They can educate employees, employees will go to trainings, but this is not supposed to be a compulsion that destroys the company's climate. Until the country gives a clear strategy or clear laws, what opportunities will these employees have, what benefits will the "retirees" who are active and mentally capable and healthy have. Now is the high time for the country to give a clear message and motivate employees to be willing to stay longer in the work process.

They also expressed that they have missed systemic changes, although the situation is improving. Employers who employ older workers otherwise receive certain incentives in terms of employment and maintaining the jobs of older workers. It is systematically arranged in such a way that the labor cost of an older worker can be 10% higher than for the employment of a younger one at the expense of the past work allowance. This fact discourages employers from hiring older workers, which has also been highlighted by the Employers' Association. The length-of-service allowance is a cornerstone of past reward models, and this allowance is certainly not in the hands of efforts to keep older people in the work process in companies.

More flexible forms of employment for older workers would be very useful, in this sense, if the health capacity of older workers is reduced in order to provide employers with the means to adapt jobs.

Currently, the promotional part is very well implemented at the country level, the possibility of subsidized or free education is enough to start the changing the company, but this is not enough, the country will have to suggest an attractive offer for companies along with the elderly to keep them in the work process.

As they said, the biggest challenge for our society is the reform of the pension system. It is very welcome that older employees prepare for these changes in time and that they will be able to endure to an older age in the work process and that they will also feel good in the workplace. The share of older employees in Slovenia is lower than the EU average, there is also the problem that we have a low share of younger employees or they join the work process very late and leave the labor market much too early. It is important that the country, through its measures, encourages young people to enter the work process earlier and the elderly to stay in it longer.

7. Research findings in Spain

7.1 Background situation

In Spain, the situation is complex. We have found from the interviews that there are programmes to help people at risk of social exclusion to find work, and in some cases, specific programmes for the unemployed over 45 years of age. We also found that social networks are increasingly being used to create groups that try to bring together people over 45 who share the problem of unemployment and also serve as a means of sharing job offers, news, resources, initiatives, etc. In this case, the groups created are the following: Linkedin: International 45+Experience 2.0; Xing: Experienced Professionals over 45 years old

These are tools that are very useful in the search for employment for older people and that sometimes help us to know the problems they have when looking for work and to be able to plan the management of these resources in our company.

Employment plans and aids for the group of people over 45 years of age:

1. **Employment for the over 45s**

The Administrations are obliged to take measures to benefit people over 45 years of age, one of the groups with the greatest difficulty in finding work. The Andalusian Employment Service aims to promote job creation and employment stability among these people.

2. **Local Cooperation Initiative**

Through the Local Cooperation Initiative, people over 45 years of age have guidance and tutoring actions, with the aim of promoting their activation and labor insertion, through specialized and personalized advice from guidance professionals and technical staff for insertion.

As a result of this measure, the occupations with the highest number of contracts in this group include bricklayers, cleaners and building construction workers.

3. **Incentives for indefinite-term contracts**

With regard to incentives for indefinite-term contracts, the Andalusian Employment Service detects the need to pay special attention to the groups that have been most affected by the economic crisis and have seen their employment opportunities reduced, such as people over 45 years of age.

In this sense, there is aid for ordinary open-ended contracts, up to a maximum of 3, carried out by each self-employed person with people over 45 years old within the lines of subsidies for Self-Employment.

4. **Projects of General and Social Interest which generate employment.**

Within the framework of the Programme for the Promotion of Industrial Employment and Labor Insertion Measures in Andalusia, these projects are aimed at unemployed people, with preferential attention to people over 45 years of age, among other groups.

7.2 Experts' experience in improving age management solutions in SMEs

Three interviews were conducted with the following people:

1) **JON MARTINEZ**: His professional and personal background has been extensive, being a psychologist by training. In this sense, he has shown us that when it comes to managing human resources, both young and old, having a background in psychology makes the work easier, as he can analyze and understand behavior from a more technical point of view.

2) **SILVIA GONZALEZ**: Always in contact with the client and with great experience in the world of the hotel and catering business. Empathy and assertiveness are her greatest weapons when it comes to managing human resources.

3) **DARIO SALGUERO**: Not only does he have experience in HR management, but he is also in charge of teaching courses to obtain certificates of professionalism specialized in geriatric care. With many studies on cognitive impairment. Dario understands how important it is to make the older worker feel useful.

Their companies are from 3 different sectors; **training, restaurant and engineering**.

All of them have extensive experience in human resources management and in managing older people in their workplaces.

Thus we found the most interesting conclusions:

- On a general level, they all point out that the process of adaptation of older employees to a new role is often not easy, especially when they encounter digital tools due to a greater lack of knowledge of digital tools.

- Everyone believes that to manage HR, regardless of age, it is essential to have the right attitude and provide an optimal and appropriate environment among workers. In short, to make a team and to be fully aware that the colleague needs to feel useful, and to the extent that the worker is a team, he or she will be more efficient and adaptable. Thus, they recommend tools to facilitate team bonding within the company, through group activities inside and outside the company.

- In the words of one of them, "make them feel like a family".

- Specific activities proposed include individual coaching sessions, accompaniment of the employee and activities inside and outside the company

7.3 Needs to improve age management solutions

According to INE (national statistical institute) data for the year 2021, the number of unemployed people over 55 years of age is as follows:

- Both sexes Total 12,31 %.
- Men Total 10,33 %
- Women Total 14,63 %

As we can see at certain times of the year, this unemployment can reach 20 per cent in the case of women due to the type of temporary contracts that exist in Spain. This makes the management of older people in companies a very important issue in Spain and this was highlighted in the interviews.

It should be noted that all of the interviews emphasize that the most important factor for the necessary readaptation of the worker is good communication and the relationship between the company and the worker. Thus, they show that any activity that emphasizes a more cohesive company and happier workers will make this process of worker readaptation and management more effective. Thus, they show that any activity that emphasizes a more cohesive company and happier workers will make this process of worker readaptation and management more effective.

Among the dynamics and good practices shown, we highlight that all those actions that allow workers to communicate their needs and difficulties will improve their performance and productivity as expected.

In this sense, individual coaching has been mentioned as an effective tool, as well as group dynamics that have a positive impact on establishing communication at all levels within the company.

On a general level, they consider it very important to be able to detect the problems encountered by the worker, in order to be able to find solutions to these difficulties. In this sense, they all value positively the existence of a tool that would make it possible to find out about these difficulties beyond the personal interview or coaching.

8. Research findings in the Czech Republic

8.1 Background situation

Employment rate and its trends

To monitor the current situation of seniors in the labor market and what are the prospects for the future, we will primarily use the statistical findings of the Czech Statistical Office (CZSO). The employment rate of people aged 55+, measured by the latest CZSO Labor Force Survey from 2019, was 87% in the 55-59 category. In the 60-64 category, just under half - 47% - and in the aggregate 65+ category, 152,100 people worked, representing just 7% of the population in this age category.

For men, the outflow into inactivity is much slower. Between the ages of 60 and 64, 61% of men are working, and another 10% are working at age 65 and over. By contrast, only one in three women aged 60-64 is employed - 34%. At age 65 and over, only 5% of women are employed. The following table shows the trend in the employment of people aged 55+ over the last decade.

Employed persons by selected age groups in thousands

Indicator	2010		2017		2018		2019	
	Total	Women	Total	Women	Total	Women	Total	Women
Total employed	4885,2	2086,9	5221,6	2305,8	5293,8	2347,3	5303,1	2352,4
60 to 64 years	184,7	57,7	304	108,9	319,6	120,9	312,8	116,5
65 years and more	75,6	29,8	127,7	54,8	147	62,1	152,1	64,2

Source: CZSO, Labour Force Survey

Regarding this data, we can summarize that the participation of the elderly population in employment has increased significantly, especially among women and the elderly.

- The number of people aged 65 and over has doubled.
- The number of working women is more than double in 2019 for both age groups compared to 2010.
- Almost 9% of employees are currently aged 60 and over.

About half of those aged 60 and more work less than 40 hours a week, compared to the population aged 25-59, where it is only a third. Part-time work appears to be an excellent compromise that allows ageing workers to stay in the workforce longer. Instead of working forty hours each week, a reduced number of hours can be chosen, giving them more time for rest or family activities while remaining economically active. However, this type of working time does not seem to be very widespread in the Czech Republic, although there is quite a lot of interest in it. Expanding this practice helps increase the economic activity of the 60+ population. In general, alternative working hours have the advantage of allowing individual adaptation to the needs of the worker, whether it is a reduction in physical effort or stress.

There is a third alternative to traditional employment, which is entrepreneurship. However, there are some risks involved: first of all, a certain initial investment is required and the income may not be regular. Nevertheless, this form of work is also in great demand among the elderly.

Older workers also seek to improve their employment opportunities through retraining. There are quite a lot of opportunities in the Czech Republic to supplement the qualifications they are missing or to acquire new ones. However, the problem is that seniors subsequently do not have enough working possibilities, as there are simply no vacancies available.

Length of working career, retirement

Workers with higher education and qualifications are less at risk of losing their jobs than those with low qualifications and have longer working careers, not only because of their better education but also because of their health.

Maintaining workability and promoting health, especially the prevention of disabling diseases, is an important factor for a longer working career. The most common causes of disability in people over 50 are musculoskeletal and mental illnesses, which are largely preventable and related to workload (or overload) and the quality of working conditions and the working environment.

Unemployment was therefore a more or less marginal phenomenon in the senior population. After their dismissal, most of these people went into inactivity and relied on non-work income, especially retirement pensions, even earlier than they planned. Only those persons whose standard of living fell after dismissal to an unsustainable level tried to find a new job. However, this tends to be difficult at this age because of the persistent negative social attitudes towards older workers.

These conclusions of the CZSO are also confirmed by Soňa Morawitzová from the foundation Krása Pomoci *(The Beauty of Helping)*, which is dedicated to improving the quality of life for people over 50 as part of the project Zlatá práce *(Golden Work)*. According to her, older people often lose their motivation to remain on the labor market because they face prejudice from employers due to their older age. *"We are trying to break down these stereotypes and show that employing older workers can be beneficial for companies,"* she added.

As a result, the real retirement age in the Czech Republic is lower than the statutory retirement age by half a year for men and 1.5 years for women.

State Support in the Czech Republic

Between the years 2016 and 2018, the Ministry of Labor and Social Affairs of the Czech Republic supported the employment of people over 50 years in the labor market with an amount of CZK 6.5 billion (over EUR 255 million) from the Operational Programme Employment 2014-2020.

If we ask ourselves whether there are programmes and legal norms in the Czech Republic, in terms of central state policy, the Ministry of Labor and Social Affairs and the general legislative framework, aimed at promoting the employability and employment of the 50+ age group, then we can conclude that:

1. In the field of national programmes in the Czech Republic, this issue is addressed in the Strategic Framework for Preparing for an Ageing Society 2020–2025, which builds on the National Action Plan for Promoting Positive Ageing for the period 2013 to 2017, the National Programme for Preparing for Ageing for the period 2008 to 2012 and 2003 to 2007. Problematics related to the ageing workforce has been rooted in Czech national programmes and strategies for more than 20 years.
2. The Council for Older Persons and Population Ageing is a permanent advisory body to the Government and the Ministry of Labor and Social Affairs of the Czech Republic.
3. The Labor Office of the Czech Republic generally pays increased attention to people disadvantaged in the labor market. So, one of the main target groups is people aged 55-64 years. The main programmes of the Czech Labor Office are the support of flexible employment forms (Programme FLEXI) and Strategic Employment Policy Framework 2030 (Active Employment Policy)
4. The State, through the Ministry of Labor and Social Affairs of the Czech Republic, financially participates in the implementation of regional individual projects co-financed from the European Social Fund, which are specifically targeted at the 50+ age group in order to improve their employment in the labor market.
5. The legislation of the Czech Republic does not specifically address measures to support the employability and employment of the 50+ age group in any law; laws dealing with labor and social issues apply to all age categories.

Strategic Framework for Preparing for an Ageing Society 2020–2025

The purpose of this strategy is to formulate a strategic approach to preparing society for ageing, which is an inherently cross-cutting agenda, affecting different areas of individual and societal life and therefore different areas of public policy. This framework should not only respond to the issues that concern today's older people but also formulate measures to prepare for an ageing society as a whole, thus including people of all ages.

Ageing policy and preparation for demographic changes in society involve various actors: the overall framework and conditions for preparing for ageing are provided by the state, while the role of other actors, particularly regions and municipalities, but also employers, the non-profit sector, academia and the media, is absolutely crucial in implementation. However, preparing for ageing is not only a matter for social institutions but also individuals as such.

Council for Older Persons and Population Ageing

The Council for Older Persons and Population Ageing was established by Government Resolution in 2006 and became a permanent advisory body to the Government on issues relating to the elderly and population ageing. In its activities, the Council aims to create conditions for healthy, active and dignified ageing in the Czech Republic and the active involvement of older persons in economic and social development.

Council meetings are held as needed, but at least three times a year. Information on the Council's activities is available to the public on the websites of the Government or the Ministry of Labor and Social Affairs. The Council does not have the power to investigate complaints from citizens.

Labor Office of the Czech Republic

One of the two main programmes of the Czech Labor Office - Programme FLEXI, helps people who, for a variety of reasons (health, family, etc.), are unable to find full-time employment. The project offers flexible forms of employment in the form of shared positions, generational tandem or offers an allowance for the integration of a new employee to employers.

Another form of support for unemployed people over 50 years is the duration of unemployment benefits. This responds to the more difficult job search situation of older people. This period is:

- 5 months for unemployed people under 50 years;
- 8 months for unemployed people over 50 and up to 55 years;
- 11 months for unemployed people over 55 years.

Strategic Employment Policy Framework 2030

In 2014, people aged 50+ accounted for 23.2% of the total number of people supported by active employment policy instruments and measures. Their share rose to 31.7% in 2019. Almost 19% were clients over 55 years of age. Supporting the employment of people over 50 years is one of the priorities of the Czech Labor Office which also serves as a motivating factor for employers.

The Strategic Employment Policy Framework 2030 sets the goal: "*In 2030, the Czech labor market, supported by cooperative and efficient employment services, will be capable of responding to global trends and will provide both decent work for the Czech population and a workforce adequate to the requirements of the Czech economy.*"

8.2 Experts' experience in improving age management solutions in SMEs

In the Czech Republic, the experts´ experience in improving age management solutions in small and medium-sized enterprises is overall good. The representatives of SMEs are very satisfied with senior workers in terms of responsibility and think they can manage relatively well. The seniors' work is very welcome and valued due to their knowledge and skills they can pass on to the younger generation of workers. They can also be full of energy and often work better quality and more willingly than some younger people. After providing training for the use of information technology they need more time to learn and automate the process but afterwards, they are coping well. However, they prefer face-to-face communication when they can besides others discuss their issues, and individual approach perhaps with a personal assistant.

Advantages are employees´ personal satisfaction and loyalty to the company. Disadvantages are that it is hardworking and time and energy consuming for the employers, and some senior employees are afraid of being spoken to in their lingo and not being understood. All these barriers depend on how the employer approaches this subject. The identification with it and readjustment of their thinking needs to come from the top management and be gradually passed on to the lower positions.

8.3 Needs to improve age management solutions

According to the experts and representatives of SMEs dealing with age management in small and medium-sized enterprises in the Czech Republic, there are certain needs that could be improved. The employers do not have any specific manuals and therefore approach their senior employees through the so-called empirics, the experience gained through observation and experimentation, and deal with matters mostly on an ad-hoc basis. According to their experience the improvement of communication, personal approach, sharing experience, more time and feedback should be pointed out. The experienced senior employees who remain in their jobs should be more valued, and using Czech language generally instead of foreign words and naming would be much appreciated. SMEs representatives also proposed an implementation of a system of compulsory work experience/apprenticeships for students at schools for them to realize that skills and experience are more important for a job placement than just reading some management handbook.

On the other hand, the senior employees themselves could be encouraged to have more confidence and maintain self-esteem to actively apply for job positions.

9. General conclusions

Our project comes at the right time. There is a **growing awareness** of the need for systematic age management in SMEs. Until now, they are mostly doing experimental steps based on gut feelings. A well-defined concept like we are planning to develop during this project, would be welcomed with open arms. It will serve a growing and increasingly pressing need of SMEs.

As is clear from the analysis of desk research in all partner countries, age management and adaptation of seniors to work is a very important topic and **all stakeholders are increasingly aware that good policy in this range can be very beneficial**. The number of seniors is growing every year, our society is aging, so it is high time that age management was applied in every organization, not only in some of them. Many managers and people responsible for recruiting and adapting new employees to the workplace still lack awareness of age management.

Companies in Poland are increasingly employing 50+ employees because they benefit from it. **Older employees are perceived as people with a stable life situation, mature, experienced and valued higher by clients.** Many SME companies take care to ensure appropriate conditions in the field of occupational health and safety and to **ensure ergonomics of work** at individual positions. Usually there are no limits in access to training and other forms of education organized by the employer. It is becoming more popular to organize work in a way that is conducive to learning, e.g. **creating teams composed of employees of different ages**. It is also becoming more common to motivate employees to learn regardless of age. They are offered, increasingly often, incentives such as **re-scoping duties** so that the position becomes more attractive to the worker, **more flexible working hours** or the **possibility of distance work**.

Regarding professional career development, however, the elderly are often not interested in further education, and at work **they value stabilization and routine**. This tendency is characteristic of workers with low qualifications, and even stronger in teams dominated by women.

When it comes to transfers between workstations, many SME **companies offer support for teams in changes that require personnel changes** (transfer, dismissal, changes in the scope of duties). However, sometimes it is a very costly or even impossible process due to the small number of employees and the related organizational problems.

Considering finally a comprehensive approach, usually, in Polish companies, employers decide to implement age management if the organization is aware that there is a problem related to the age of employees, which has or will have a large impact on work efficiency. Few SME companies in Poland apply a well-thought-out comprehensive age management strategy for their employees, but it's steadily changing for the better.

The situation in Spain is very similar to Poland: there is a problem with the **high rate of unemployment in people over 55 years old**, finding that the accumulated unemployment

among those over 45 years old reaches 30%. These are alarming figures and we must find a solution so that these workers can remain in the companies being fully useful and productive.

In view of this situation, the interviews carried out show us the **importance of human resources management** for older people and the techniques that allow these people to feel useful and capable when it comes to readapting their performance.

The fundamental thematic focuses for the meetings would be:

- Tools and dynamics that encourage communication.

- Tools capable of detecting the worker's problems.

All the participants are professionals in the management of human resources within their companies and all of them showed us that they would be **very interested** in knowing how and what mechanisms are used by large companies and corporations to manage the human resources of older people and to be able to transfer these dynamics and good practices to SMEs.

In Slovenia, demographic changes and population aging are having an increasing impact on the labor market, as the **active age population** (20 to 64) **is declining very rapidly**. An increasing group of able-bodied people is between the ages of 50 and 64, a third of all people in employment.

Thus, it is necessary to respond to demographic challenges with various measures, both at the level of society, employers and, above all, the individual. It is necessary to **overcome stereotypes** towards older workers in public, **strengthen effective management** of older employees, and the individual must recognize the need for lifelong learning and continuous development of competencies for the changing labor market. Demographic change, which requires longer employment, is also increasing the need to integrate into lifelong learning.

Changes are a constant in the lives of companies and employees and are essential for their development, growth and success. Important company decisions and orientations are often enforced **without the involvement of those who have experience in companies, long-term insight into change, and historical memory**. It is the employees, especially the elderly, who will have to live with these changes and introduce them into their work. If the success of a company depends on this, managers and directors need to realize that experienced senior employees need to be involved in the change process.

Germany is above the EU average when it comes to the speed of the growing population of the elderly. The tendency of older people to work has increased disproportionately in the last few years compared to the overall tendency to work. Therefore, many companies already make use of the capacities and skills of older employees, who can still develop their performance potential except in very physically demanding activities. It is popular to offer employees entering retirement on a voluntary basis to make their expertise temporarily available to the company during retirement, as **they are valued as knowledge carriers** and at

the same time they are **trusted with the potential for innovations**. In order to be able to use employees' skills for longer, more and more companies are installing flexible working time systems with long-term accounts.

However, all experts concur in the assessment that age management in SMEs is still in a very early stage in Germany, but is **continuously improving**. Older workers that were mostly deemed a burden 10 years ago are now increasingly seen as an asset companies need to keep and develop.

Some SMEs make the mistake of excluding older workers from new projects or the training on new tools, software or processes. This is deemed **extremely counterproductive** by the experts. Older workers can and do still provide valuable insights and experience.

In general, many **SMEs lack knowledge in the age management sector**. Many employers and HR-managers wish for a dedicated information exchange among them to facilitate the exchange of experiences with age management. Companies still are **not aware of their human resource potential** they have among the elderly. And finally, **they lack the resources** (both financial and personal) that large companies usually have. Therefore, a toolbox with proven methods for the prolongation of the employability of older workers will be highly appreciated.

As in all partner countries, the situation in the Czech Republic is no different. Participation of the **elderly population in employment has increased significantly**, especially among women and the elderly. Almost 9% of employees are currently aged 60 and over.

Workers with higher education and qualifications are less at risk of losing their jobs than those with low qualifications and have longer working careers, not only because of their better education but also because of their health. However, when they do, they have difficulties with remaining on the labor market as **they face prejudice from employers due to their older age**.

In the Czech Republic, the experts´ experience in improving age management solutions in small and medium-sized enterprises is **overall good**. The seniors' work is **very welcome and valued** due to their knowledge and skills they can pass on to the younger generation of workers. They can also be full of energy and often work better quality and more willingly than some younger people. After providing sufficient training for the use of information technology, **they are coping well**.

That being said, the **employers do not have any specific manuals** and therefore approach their senior employees through the so-called empirics. The experienced senior employees who remain in their jobs **should be more valued**, and **using Czech language** generally instead of foreign words and naming would be much appreciated.

When it comes to the **need to improve age management solutions in SMEs**, our research shows that **more projects** targeting both older people and potential employers can help. **Financial incentives** for potential employers who want to hire older people and **systemic solutions** at the level of the entire country or region would also be useful. Solutions at the state policy level should provide clear information that it is worth staying in the labor market

for the elderly and that it brings benefits. European countries should **motivate older people** to stay in the labor market as long as possible.**New channels** to reach older people who often do not know how to undertake social and professional activities would also be helpful. SMEs wish for **more information** on age management. Activities to **raise the awareness** of the owners and managers of SME would be very helpful. Our research shows that a **toolbox** with proven methods for the prolongation of the employability of older workers will be highly appreciated. Among the solutions, it was indicated **individual coaching** has been mentioned as an effective tool. In this context, the **sharing of knowledge and experiences** between older and younger employees also plays a very important role. Appropriately matched **mentoring programs** can serve this purpose.We also need **tools to detect the needs and problems** encountered by employees. When considering actions that can be taken by employers in SMEs themselves, **more flexible forms of employment** for older workers would be very useful, in this sense, if the health capacity of older workers is reduced in order to provide employers with the means to adapt jobs. Regarding the organizational level, the most important factor for the necessary readaptation of the worker is **good communication** and the **relationship** between the company and the worker. Some **guidelines** are needed for employers on how to act in terms of age management, so that their activities are not undertaken ad hoc, but are permanent, long-term and deliberate.

Summing up, our research shows that in the field of age management in SME organizations a lot has changed in recent years, but the needs are so many that the range of possible actions is very wide.