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Generational approach to the social patterns of relation to work

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Changing social patterns of relation to work

Selection of good policy practices

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Generational approach to the social patterns of relation to work

Changing social patterns of relation to work

Workpackage 5: Selection of good policy practices

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Introduction

The SPReW project focuses on the factors leading to solidarity or tensions in intergenerational relations, in the area of work. Recent researches raised the hypothesis that the younger generation has different attitudes, forms of participation, expectations and engagement in work than the older generations. The pessimistic view concludes to an increased individualism, but this assumption is not founded on robust research. The project will provide a better understanding of the evolving relation that generations have to work. Such changes have important consequences on intergenerational relations at the workplace, on solidarity between generations, and on the relevance of specific work and employment policies as well as on other public policies. The relation to work can be analysed through different angles: value given to work, expectations associated to work, vision of the future, relation to precariousness or mobility, more generally the construction of an identity through work and the linking with other key values. A link is also established between the relation to work and other correlated issues: family formation and lifestyles, intergenerational relations in society, social inclusion or exclusion. The gender dimension and the position of migrants are constitutive and transversal aspects of all research tasks. The project also analyses age policies related to work and employment and identifies good practices. The research methodology combines qualitative, quantitative, comparative and participatory approaches. The key objectives are to draw out social patterns of relation to work for different generations, including the gender dimension; to study articulations with other societal fields (family formation and lifestyles, intergenerational relations, social cohesion); to develop awareness of public authorities and social actors on the generational dimensions in the relation to work and employment; to draw out guidelines for youth policies and ageing policies in this area.

The report

This report proposes a collection of policy practices in the field of youth, employment and ageing policies that have an intergenerational perspective and that can be learning experiences. The purpose of this report is to support the transition between research results and policymaking. This overview of policy practices and orientations has been made at the national and the European levels. The first part of the report deals with experiences at the national level, the second part analyses policies at the European level.

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Part I

Collection of good practices at the national level

1. Introduction

This first part of the WP5 consists of a collection of relevant experiences, in the field of youth, employment and ageing policies, focused on the social patterns of relation to work (and correlated societal fields), in an intergenerational perspective.

After focusing on both targeted qualitative and quantitative empirical information, collected through interviews and quantitative analysis in the six countries involved in the project (Belgium, France, Germany, Italy, Portugal and Hungary), the empirical approach can be developed through a selection of “good practices”, regarding the fields investigated during the previous steps of the analysis (in particular WP3 and WP4). During and after the whole process of empirical approach, in fact, the partners have pointed out some specific policies that seem to be particularly well focused on the intergenerational approach to the social patterns of relation to work. The try is to empirically verify whether and how social, economic and cultural issues linked to the changing relation to work of different generations are dealt with in local realities, through designing and implementing specifically tailored strategies, in the perspective of a knowledge based society.

This stage of the research consists therefore of a reporting process of the descriptions of “good practices” which have been identified in each of the six countries involved. Each partner at national level has in fact prepared a structured compilation of its selection of those actions that have been found useful and congruent with the core dimensions of the relation to work for different generations.

The main purpose at this stage of the work is to take into account the outcomes of the previous steps of the analysis, but in a dimension of *transition* between research and policies. The aim is not only to assess “what has been done” in each country in order to tackle specific issues emerged: the purpose is also to found suggestions of guidelines to address policy makers and social actors.

As the whole research, also the collection of good practices at national level follows an integrated approach, which includes various dimensions of the relation to work for the different generations: in particular, attention has been paid to the working environment and the conditions of the upcoming knowledge society, as well as to the gender approach.

The integrated overview of good practices covers specific fields, and also refers to targeted policy areas.

The first field taken into account is the one regarding the relation to diverse *work components*: the selection of good practices through the different countries involved has paid specific attention to aspects like precariousness, mobility and especially knowledge management, in particular connected to the perception of overall organisational and technological changes.

Another field of investigation for the choice of good practices regards the lifestyle and more in particular the relations between the *relation to work and family formation and structure*.

Nevertheless, the core of the selection of good practices focuses, above all, on the *intergenerational relations* at work as a mainstreamed theme. High degree of attention is paid to intergenerational aspects affecting work and employment trends; to the debate concerning younger workers and ageing workers, in terms of cooperation or conflict; to the challenges linked to intergenerational relations at work in terms of transmission of knowledge, solidarity, career patterns, perception of changes; to the forms of intergenerational relationship also outside work.

All this is framed in the overall dimension of social cohesion, in the view of work as a key element in the construction of social capital, and of the articulation of work with other areas of the life in which younger and older people build their identity.

2. Methodology – criteria and methods to select and frame the different experiences

The national partners were asked to consider as a “good practice” “the use of diverse instruments, which is generally regarded as '*practices which are good for learning*', i.e. practices which either achieve their own objectives and/or have a beneficial impact on their environment, and/or – and more importantly – provide useful learning experiences which are likely to stimulate creativity, ingenuity and self reflexivity on the part of the user”.

The choice of this definition of “good practice” responds, in this particular phase of analysis, to the necessity to target the object of the research in coherence with its purposes and aims: these consist in going beyond the scientific results towards policy relevant findings, and in addressing the potential users of research results in the concerned policy areas. As a step in the research process within the project, the good practices selected are relevant in relation with the outcomes of the national analyses carried out: in fact they have been understood as specific strategies implemented at a specific level to cope with the challenges that the partners have identified during the qualitative and quantitative research. With regards to the final aim of the whole research, good policy practices have to be “learning examples”.

Therefore, the adoption of this definition of “good practice” has been made with particular regards to the *learning dimension*, intended as the possible contribution to policy developments.

It is true that the above-mentioned definition is quite wide and can be broadly intended. This responds to the need not to excessively narrow the research ground, especially considering the different national contexts in which the research has been carried out.

On the other hand, as a previous statement, the partners have been required to make a data collection not necessarily exhaustive but more illustrative and especially well targeted to the SPReW concerns: *importance has been given to the variety of experiences more than to the extensive description or accumulation of identical practices*. This criterion is at the basis of the strict selection as “eligible” of only a part of the practices, which had been identified by the partners in a first stage of the collection.

In order to provide common paths for the selection of the good practices to all the partners, and in order to obtain comparable descriptions and results, a scheme of methodological criteria has been provided.

With regards to the *individuation criteria*, it has been kept into account that, when collecting good practices, one may gather very diverse material, such as (just as examples): governmental guidelines/interventions, legislative measures; collective agreements; company policies; awareness campaigns, events (conferences, seminars, trainings), exchange programmes, leaflets, creation of web sites, etc.

The core of the methodological and selection activity has been focused on the clear definition of the policy areas in which the good practices regarding intergenerational relations to select are potentially framed. The targeted policies can concern:

- Specific labour market policies (for example aimed at promoting younger/older people/parents employment, guidance, access to the job, increasing job stability)
- Specific education and training policies (apprenticeship, stages, on the job training, life-long learning and qualification policies; vocational training, reprise of education, re-training or reinsertion of unemployed people)
- Specific welfare state provisions aimed at fostering job security (unemployment indemnity, minimum wage/income, etc.)
- Specific collective agreements (addressing issues like recruitment, career developments etc., and/or concerning specifically targeted company services, benefits, etc.);
- Specific human resource management practices (regarding, for example potential evaluation, retaining, career planning, company services, benefits, etc.)

Partners have also been suggested to keep into consideration the existence and the implementation of policies related to demographic change and mobility (beside the life long learning). Other aspects highlighted as worth to be considered are the transversal gender and ethnic dimensions.

The most difficult issue of this framing phase has been to give borders to the means of the collection of initiatives within the selected policy areas to be investigated. As a matter of fact, it has not been easy to keep the focus on the core of the argument that this project wants to tackle. The good practices may have different levels of relevance regarding the SPReW objectives: some focus on specific age groups, others focus only on conciliation issues, others are more peripheral with respect to the key argument. The ones, which have been selected here, are those who take into account the intergenerational dimension in different social areas and *target all generations together*.

Always with regards to the *individuation criteria*, partners were encouraged to select practices identified at different levels. With specific regards to the *application and the implementation* of each good practice in exam, and the levels have been identified as enterprise level (including initiatives that can be undertaken by sectoral or local employers associations); local/regional level (initiatives taken by different actors -see below- for instance at the level of regions, consortia of municipalities, industrial districts, groups of administrations); national level.

The partners have been required to provide different examples for each level, if equally relevant in their opinion.

With regards to the time frame to keep into consideration, currently ongoing policies, recent ones (since 2000 and just concluded) and ones previewed for the next future have all been considered.

With regards to the *description criteria*, it has again been required to the partners to follow a common structure, and therefore to report, first of all, a general presentation of each good practice selected, giving an overview of the national political and contingent context, the framework in which it is collocated, explaining the reasons of the specific choice in the view of the intergenerational approach to social patterns of relation to work, and especially in the view of the outcomes of the previous steps of the research carried out at national level.

In addition, a clear description of the following elements has been required:

- the type of “initiator / policy maker”: for instance public authorities or public institutions at different level; entities exercising the political role at national or local level; with regards to the educational and training system, high schools, universities or any other kind of education providers, but also private entities; social partners; civil society including entities as women's organisations; specific partnerships; professional federations etc.
- the target groups, the addressees of the good practice: younger/older employed/unemployed, managers, women, young about to enter the labour market, associations, federations...
- the kind of tools and means used to reach the policy aim (i.e. leaflets, videos, conferences, meetings, workshops, cycles of lessons, etc.)
- the duration of the action connected to the policy (one shot event, a long time project, a permanent asset)
- whether there has been or if it has to be done an evaluation of the policy action, and through which means
- the informative sources of the policy you selected and of the actors committed in it (i.e. Official Journals, websites...)

On the basis of such a rationale, each national partner has been required to provide a 6-10 relevant national cases of good policy practices, giving privilege to the variety and the innovativeness of the experiences.

3. Intergenerational and generational issues through the collection of good practices: general overview

The analyses conducted so far by the national partners following a qualitative approach have underlined a series of elements, which characterise the intergenerational relations at work. These elements include both aspects of cooperation and positive interaction between generations and, less often, aspects of tension (see Synthesis report for WP3).

The same elements of cooperation and tensions have been kept into consideration also in this phase of the research. The practices individuated at national, local and company level often respond to the necessity to find an answer to some of the questions raised during the qualitative analysis, where, beside the individuation of the main characteristics and issues affecting the intergenerational relations at work, it has also been possible to draw some possible positive solutions to those issues (WP3, final part). This constitutes a confirmation of the learning potential of such a collection, in the view of a research conducted in the perspective of concrete policymaking.

The research of good (policy) practices at national level has been characterised by a series of findings, which may lead to general considerations.

On the one hand, a general attention to **demographic and generational issues** connected to the working life has emerged. Institutional and private actors, as well as organisations, both at private, national or international level, consider age management as an important issue. The national reports and collections of good practices underline in particular that, in the last years, almost all the Governments, facing the demographic change, have settled several policy initiatives towards the increasing of occupational, economic and social integration as well from the age point of view. These processes, most of the time descending from policy frameworks set at European level (declined through the Lisbon strategy, the European Employment Strategy, Guidelines for Employment, but not only), in certain cases, and even if not always directly, tackle generational issues connected to the relation to work.

Nevertheless, even the most general interventions have to take into account a high degree of **fragmentation** of the labour market and as well as of the working society. The outcomes of the research of good practices carried out at national level reflect this fragmentation and its influence on the drawing of possible solutions to occupational and social issues under the generational point of view. In fact, most of the practices individuated appear as mostly disconnected from the intergenerational perspective, and tend to consider age management policies mainly from the standpoint of one age group.

Another aspect of fragmentation is revisable with regards to the gender perspective, whereas specific initiatives only take into consideration women employability and the particular conditions of the female working population.

As a matter of fact, in consequence of this deep fragmentation, in almost all the countries and both at national, local and company level, it has been much easier to identify good practices which are separately addressed to specific age/gender groups and their particular conditions with respect to the labour market. On the contrary, policies and other initiatives concerning at the same time different working generations and genders and, in particular, both the younger

and the elderly workers have been more difficult to individuate, due to an objective minority of intergenerational practices with respects to the ones targeted to specific age/gender groups.

Moreover, from the analysis of the national reports on good practices, it is possible to say that the high level of fragmentation not only makes difficult to find common solutions in order to manage relations among different generations and genders at work. The engaged interventions, proposed in the view of such a high level of differentiation, might risk to produce perverse effects, more favourable for one generation, but with consequent disadvantages and growing level of segregation for other generational or gender groups. Stigmatisation of age groups appears more and more as a threat both for social cohesion and for efficiency at the work place. This conclusion therefore supports the necessity to increase, where possible, intergenerational approaches which take into account several interests at the same time, in an integration perspective.

The abovementioned remarks emerge quite clearly from the national reports, which have been provided by the partners of the project. The fragmentation of the labour market as well as of the society in general in almost all the countries imposes policy makers to address specific initiatives to age groups. Problems regarding **young population** and their difficulties in entering and staying in the labour market are perceived as particularly sensitive issues. Most European countries have developed dedicated programs to support youth employment and action plans that “incorporate many different strategies and initiatives to increase employment, to reduce unemployment, to increase skills and qualifications, to raise the participation of young people in vocational training, and to improve the relation between knowledge and the skills needed by the economy”¹.

These strategies represent congruent answers to a sense of precariousness and insecurity towards employment, which commonly affects younger generations, as, clearly emerged in Belgium, France and Italy.

In France, the research of good practices has underlined two facets of the problems affecting young generations: on the one hand, the insertion of students in the labour market, connected to the fear of diploma depreciation; on the other hand, the recuperation of disadvantaged young people, who may have known school failure and poor family background, who are trapped in a vicious circle of unemployment and dead-end jobs.

In Italy, the policy approach realised by the central State towards the young generations related problems is more recent. The reasons are revisable in the characteristics of the Italian Welfare Regime, where the role for the family is of crucial importance. The family generally supports for a long time their children to find a job, and offers financial and psychological support to the unemployed – whereas the unemployment benefit provided by the welfare system not always exists, or are very low. The State usually intervened only when the family was in strong difficulties. This meant that the subjects that this Welfare regime has strongly protected and still protects was and is the adult worker head of a family (mostly a man, the typical male breadwinner model of family) rather than the young people which found in their families the principal supporters. Generally, the realisation of some interventions have been delegated to the family and to other social actors; if some public intervention and policy measures have been planned, they have been realised more at local level by the Municipality. The new attention paid to the problems of the young generations is due to a general and

1. Biletta I., Eisner M., *Youth and work*, EIRO, 2007

structural change of the labour market, which has been made more flexible by a series of legislative interventions. This flexibility, not always accompanied to the necessary aspects of “security”, nowadays affects the young generations in terms of precariousness and instability of the employment. In the last years, also thanks to the European policy frameworks, huge national reforms started supporting specifically young people: for example, facilitating access of young people to employment, and also trying to stabilise the employment (for example trying to convert more and more non standard contracts into stable and standard contracts); developing and making good use of the skills and training of young people (support education for young people with study grant and scholarships); trying to foster creativity and the consumption of cultural merit goods of the young people (tax deductions for creative entrepreneurial activities for people under 35 years).

In Hungary, which is still dealing with a long period transition due to the change from the communism to the capitalist economy, employment policies targeting young workers are of key importance, given the unemployment rate among younger people. As a result of the shrinking of the labour market after the change of the regime (as many as 1.5 million jobs were cut in the course of a couple of years), unemployment became massive throughout the country. Most affected by this on the one hand were the oldest segment of the population in active age, which was closest to retirement, and the youngest one on the other hand, which only entered the labour market or were about to enter it. The former was forced to leave the labour market sooner, while the latter had to postpone entry into it. While prior to the regime change almost every school-leaver was able to get a job, in the beginning of the nineties unemployment rate was 27-33% in the age group 15-19 and 14-17% in the case of 20-24 year olds. Unemployment remains one of the youth’s main problems even today. As much as 42.7% of the inactive segments of the age group 15-29 have never had a permanent job. The proportion with regard to the inactive population, which does not pursue studies in the same age group is 45.1%. In general, young people are badly paid and only with difficulty do they find jobs that suit their qualification, except for an exceptional managerial and IT stratum. The largest number of employment policies targeted to young generations can be found on national level. There are fewer, but still quite a lot on regional level, connected to the main issues, especially for the Eastern part of the country, to create jobs and retaining skilled workforce, dissuading them to move to the most advantaged areas of the country, the West and the region of Budapest, attractive because of the potential to provide high level education and employability in the public administrations. In general, company level initiatives, not only regarding youth policies, are instead very few and based on a case by case attitude. Every company has its own way to approach age management, which is dealt directly by the owner or the manager in charge, on a personal basis, and only few multinational companies are introducing a change of mentality bringing up principles of corporate governance, for example with regards to young female working population with family care duties (young children).

In Portugal, employment policies targeted to younger workers derive from National Plan for Employment 2005/2008 (PNE), which founds a set of good policy practices – in line with the EU recommendations at national, local/regional and enterprise levels. One of the goals consists in a renewed commitment in the creation of jobs for young people and decrease of young people’s unemployment, especially the one of graduates. In this scope, one of the measures reported regards a national programme which proposes the insertion of young graduates for the innovation of SME’s. In turn, concerning young people, the Proposal for the Reform of the Active Employment Policies, assumes that to increase youth employment and

combat youth unemployment the strategy should include: 1) Initial qualification of young citizens; 2) Exemption of the Unique Social Tax (TSU) payment in the contracting of young workers; 3) Fiscal incentives to the creation of jobs for young people; 4) Support for contracting young people; and 5) Professional traineeships.

In 2005 the unemployment rate among young persons in Germany scarcely differs from that of the comparative countries in the euro zone, but at the same time, the employment rate of young persons dropped between 1995 and 2005. In comparison to other countries, young persons at the beginning of their working life in Germany are more rarely affected by unemployment than their peers in other countries. They traditionally profit from the dual vocational training system, based on the main features of training and practical work experience in a company (lasting no longer than three and not less than two years) combined with school education in vocational schools funded and controlled by the government. Company-based training represents the core of the dual vocational training system in Germany. The dual system was subject to great pressure due to the tremendous structural transformation after the turn of the millennium. Companies cut back their supply of traineeships enormously. Especially young men with low-level school-leaving certificates are at a disadvantage. The government took the place of the companies and greatly expanded the so-called transition system, with programmes that differ according to federal state. A common feature of all of them is that they are intended to improve labour market opportunities, but not to pave the way to a certificate of qualification. They include measures offered by the Federal Employment Agency that are aimed at eliminating the deficits of the applicants for a traineeship; vocational schools that do not provide a vocational training certificate; year of vocational preparation or year of basic vocational training”. The state-organised system merely provides training without any market value.

The national partners have found several practices regarding de-taxed labour of young inexperienced people, for example, or providing not well regulated initial professional trainings for students, which do aim, in their intentions, at facilitating the entrance of young people in the labour market providing them with first professional experiences. The problem with this kind of practices, however, is that sometimes they do not actually produce virtuous results. They sometimes also offer companies the possibility to use low paid workforce, easy to replace at the end of the favourable period, or introduce young students in a mixed scheme of work and study which constitute neither a genuine occupational situation nor a profitable period of education. The risk is to feed a vicious circle of passage from a “facilitated” form of not genuine employment to another, which rarely is actually useful to the young, and on the contrary stigmatises their situation of precariousness and exploitation.

With regards to **policies related to older workers**, the national reports again stress that they are treated separately and independently². In particular, in Italy they are approached at national level as a consequence of the structural changes of the labour market of the last years. Whereas a high level of protection was accorded to adult workers in function of their role of main source of financial income for the family, from the Seventieth of last century on, with the first oil shocks and the widening process of globalisation, many transformation occurred at different level: economic, social, cultural, technological, political, demographic. So after the Eighties of the last century until today, the “adult workers just over 40 years old”, even with high level of education, have easily been victims of redundancies. Nowadays, they are

2. See again Naegele and Walker, op. Cit.

part of a “social vulnerable area”, and, once expelled, they experience strong difficulties in re-entering the labour market, unless they are supported by specific policy practices. From the Eighties of last centuries a strong policy intervention to support unemployed people or long term unemployed and a first awakening of the public opinion how to combat the ageing of the population took place. The policies combating the process of the ageing workforce are increasing at all the levels although they have still a long way to go before becoming a top issue of the Italian political agenda. The not only national policies to support older workers and combating the ageing of the work force can be synthesised in the following four policy areas: employment services have built an *integrated system of different policies* – guidance, counselling, vocational training, accompaniment – for the re-insertion in the labour market; many different types of working contracts incentivise the re-entering in the labour market of older workers such as the divided work, the new part-time, the new apprenticeship, the insertion contract, the work project; the creation of professional funds and funds for life long learning help to value the professional competences of older workers and to avoid the obsolescence of their skills and abilities and to support their employability.

In Hungary, as far as older workers are concerned, the company level definitely fails. Although there are several methods to promote older workers’ employment and to make use of their potential, companies most often do not use them. Introducing telework could be one way; however, only 5% of the companies provide this option. Another practice quite developed is part time work, among private and public sector companies with more than 50 employees: 65% of them employed part-time workers. This kind of work organisation is particularly preferred in education and public health, where the number of older employees is higher; 15% of the employees aged over 45 years in these sectors are employed in part-time jobs. The problem of employment of the age group of around 60 or beyond is even more complex. As early retirement was an escape route for many groups trying to avoid unemployment looming as a result of the economic changes following the regime change, therefore the proportion of the population on disability pension increased significantly, resulting in a very high rate of inactive population. However, the government is planning to undertake a reform of the disability pension system and to modify the official retirement age, limiting and regulating early retirement options. However, a lower retirement age was not experienced as a problem for most groups of Hungarian society as they did feel the desire to continue working after retiring. Except for some highly educated groups, who work partly or mainly for self-fulfilment, those who continue to work beyond retirement age are in a real need of the income gained from it. Poverty or at least the need for additional incomes, made many older people work. In many cases they found jobs outside their original occupation or profession with their knowledge not being up-to-date any more. They filled the bulk of positions like night guards, ticket-collectors, museum guards etc. This has significantly changed by now as those activities are carried out by younger people specifically trained for these positions. Nonetheless, the need for the extra income above pension has remained; the positions waiting for these people are disappearing. The Government plans to cover these needs with a reform of the pension system.

In Germany, at the end of their working life employees are also exposed to higher risks than at middle age. The employment rate of older workers (55 to 64 years of age) is very low, 39.2% of the resident population (2004). At the end of working life, early retirement currently plays a declining, though still a major role.

In Portugal, in the recent Proposal for the Reform of the Active Employment Policies of August 2007, one of the considered as “fundamental lines” is “to increase employment and

combat unemployment of older workers”, in accordance with the National Strategy for Active Ageing. In this proposal the measures to be implemented are: the exemption of the Unique Social Tax (TSU) payment in the contracting of elderly workers; the support for contracting of elderly workers (to be created); a Programme of Senior Volunteering. If during the Eighties and Nineties, the way to deal with the young generations’ unemployment was to facilitate or even encourage the anticipation of retirement (in the view of those perverse effects mentioned above, favourable only for one age group, but disadvantaging another), currently the employment policies are changing. Employment of older workers has started to be seen as an important variable in the sustainability of Social Security, for instance, but it is mostly absent in the media and good practices related with the older generations were not easy to find.

At the legislative level, a Resolution of the Ministry Council n°141/2006 stated that to reinforce the incentives to active ageing through a new national strategy for active ageing and adopting flexible mechanisms for the retirement age (65 years) is a main objective. Moreover a Basic Law of Social Security (law n°4/2007, 16 January) declares that the law can consider measures of flexibility of the legal retirement age to have the right to pensions through mechanisms of reduction, or introduction of bonus, in the case of anticipation or postponement of legal retirement. And there will be a reinforcement of incentives to active ageing through a new national strategy for active ageing and the implantation of flexibility in the retirement age favouring long contributing careers. In October 2006 an agreement, obtained by the Economic and Social Council - the permanent commission of Social Agreement, took place between the government and social partners, around these new directives about retirement, the calculations of pensions and the protections of long contributing careers. But all of these changes are too recent.

Some remarks regarding the **gender perspective** as emerged by the collection of good practices at national level. As mentioned above, it seems that the fragmentation affecting the approach towards generations is present also with regards to the gender perspective. It seems that younger workers, as well as older ones, are not gendered. The relation to work and gender are not treated in connection, whatever can be the policy level. The gender topic has been developed along several directives both at European level and at national level in terms of equality policies, but a real integration with intergenerational issues is still not developed. All policy practices dedicated to women are in the area of conciliation, with no real correlation to any other topics such as relation to work, generations or others. Women problems in their patterns towards employment, and consequent policies or practices, do not usually consider the generational aspect, while are still mainly only connected to childcare and family roles. With regards to this aspect, revisable in every country, the Hungarian introduction to the collection of good practices contains outstanding information. A salient outcome of our research in WP3 was the hostility expressed towards those young, self-realising young women who try to build a professional career. The perception of the group of young women underwent significant changes, as new career paths opened up for them, in the face of the mentality of Hungarian society which continues to hold that women’s real task is at home. Hungarian society is very family-friendly on the level of rhetoric. Family represents a very important value. Women managers, therefore, are continuously confronted with the expectation, which they try to live up to: starting a family and having children. However, they receive very little support for this. This is the reason why several good practices regarding policies which help women in reconciling their careers with their family lives have been laid a special emphasis.

4. Good practices focusing on the intergenerational dimension: analytical overview

Being the above an overall overview of policy practices which have been highlighted in some of the national reports, it has to be underlined here that in the SPReW perspective, it was important to focus on the dynamics of relations between generations and to point out innovative practices that take into account more than one generation together. So, within the broad range of practices dedicated to specific age groups (mostly youth and aged workers, seldom the mid-generation), we have tried to gather examples tackling interactions between generations and that therefore regard more than one of them together.

As already mentioned above, it was not an easy task to identify concrete examples that focus on the intergenerational dimension. This difficulty not only reflects the high level of fragmentation of the working society, it also feeds the impression is that this is an emerging issue. *Awareness activities are taking place, at the public and private level, but, however, this awareness building is not yet highly concretised in projects.* Thinking generations together seems to be a new topic, both in the public and private spheres.

This impression is clearly stated in the Belgian collection of good practices. Confirmation to this view are available in almost all the other reports, where the partners have faced the lack of good practices addressed not only to the younger rather than only to the older workers. Italy reports that in the last years more and more attention has been paid to dialogue between generations and mutual support, in view of fostering the entrance of young inexperienced people in the labour market, the maintenance at work of older employees, and their exit from the labour market with a social recognition. But these practices are still not much developed, and, as in most of the other countries, they mostly focus on the field of the transmission of knowledge. Intergenerational relations do not represent a topic discussed nowadays in Hungary; therefore only practices related to one generational group per time are available.

From the methodological point of view, we have gathered those practices, which are mostly related to the intergenerational dimensions, and we divided them in two different clusters.

The first cluster files the practices, which are targeted to more than one generation at the same time. It is remarkable that the mutual exchange always regards young and old generations: the mid-generation does not take part to these practices. This cluster has been sub-divided into four sub-groups, in which the good practices have been classified on the basis of the issues tackled. The first one regards practices of **awareness building** as a first step in order to face and solve the problems that may arise from the confrontation of different age groups at work. In the other three sub-groups we have classified the good practices which are more related to organising dialogue and cooperation among generations, in the view of fostering **knowledge transmission, job integration** and **good relations** between generations at work.

The second cluster, always in the same view, gathers those practices, which are mostly targeted, to the older workers, but always in the view of the intergenerational collaboration.

We also have to specify here that **the absence of a classification of practices on young generation is due to the fact that all the policy practices dedicated specifically to young workers do not really present any intergenerational perspective.** Moreover, some practices dedicated to the integration of young workers have been rejected because they were in contradiction with the SPReW results. This point will be developed under point 7.

Beside the classification we have introduced above, based on the aims pursuit under an intergenerational perspective, the policy practices reported in the following pages can be analytically described also with regards to their “internal” characteristics, which regard their initiators, level of implementation, extension and target groups to which they are specifically addressed.

Some of the policy practices have been **directly implemented at company level.** This common ground of implementation might function as a possible criterion to analytically describe their contents. The policy practices briefly schematised in the table below have had a *direct impact within the companies*, as have been *directly developed within them*. Such a schematisation is important in order to be aware of what actually happens within the companies, which are the main intergenerational features and issues to be faced and the paths and approaches in order to deal with them.

The “**identity**” of the initiator is an important element to analyse. In some cases, as it is possible to see in the table below, the initiator is the company itself (as for *Accor* in Belgium and *Somague Engineering* in Portugal). This means that in certain cases the company managements have realised that intergenerational related matters are part of the everyday life of the company, and have to be dealt with in order to improve internal relations, as well as productivity. This kind of initiatives actually represents the expression of a need arising directly within the company. Nevertheless this need is not only expressed by a direct and lonely involvement of the company managements. In fact, beside the direct initiatives of single companies, the other practices developed at company level have been initiated following a collaboration between social partners, by employees’ and employers’ organisations acting together, which have found a common ground of action. The Italian practice (*Mec - Lab*) lies on a sectoral collective agreement, involving companies at a very local level. In other cases, company level practices have been set and implemented with the help and the coordination of “third” bodies constituted by managements and employees associations, as it is the case for the two German examples. The French practice, finally, have been initiated by a public agency which has found the collaboration of a huge industrial group.

With regards to the contents and the aims of the practices strictly targeted at company level, one of the practices focuses on the management of intergenerational issues in general, with the aim of improving the relations at work (*Accor*). For the other practices, it seems that the main ground on which the intergenerational relations at work may more specifically be dealt with consist in the one regarding knowledge, skills and competences. Within this ground, there is a polarisation around two main features.

The first one is represented by age management: in fact, three of the practices listed below have been filed within the second cluster. They deal with the necessity to face the progressive ageing of the workforce: the idea behind consists in making a resource out of it, in terms of evaluation of competencies and capabilities, valorisation of the experience and integration with the new younger generations. Even if these practices mainly regard the older generations

of workers, the intergenerational perspective clearly arises in the view of their correct and proactive collocation within the company, considered as a whole, in which integration and cohesion are fundamental. And in fact, it is true that, in some cases, the practices directly involve older workers, whose competencies have to be assessed, updated and valorised, who need to be trained, motivated and promoted in a view of proactive exploitation of their experience. But in other cases the direct beneficiaries of the practices are the company managers, who really need to learn and develop new approaches in dealing with the generational features connected to the workforce ageing, who will have to match the different characteristics and exigencies of the different age groups present in the company.

The second common ground on which good practices have been developed at company level is represented by the *transfer of knowledge*. These practices represent a step further with respect to the assessment and the evaluation of the competencies of the older workers, and a possible fruitful way to utilise them in relation to other age groups. Diagnosis of the knowledge transmission processes, individuation of good practices, exchange of knowledge from more experts to young, evaluation of the competences of the other group are the main instruments which have been used in order to develop a facet of the intergenerational relations at work which seems to be one of the most prolific.

Policy practices directly implemented at company level

| Policy practice | Type of initiator | Level of implementation | Extension | Target group | Aim | Tools |
|---|--|---|----------------------------------|---|---|--|
| <i>Accor: “Inter-generational diversity: we can really do better together”</i> (BE) | Private initiative (Accor Belgian HR department) | Company level (Accor Company) | (National) Belgium | Managers and middle managers of the group | Improving relations at work (high age polarisation) (Cluster 1.4) | Information sessions, training programmes, publications concerning inter-generational diversity |
| <i>“Mec - Lab” – new horizons for workers over 45 years old in the mechanical industry of Bologna</i> (IT) | Social partners in mechanical industry sector | Company level (mechanical industry sector) | Local (Bologna, centre Italy) | 50 older workers over 45 years old both men and women | Support workers over 45 to maintain, valorise and ameliorate skills and competencies (Cluster 2) | Personalised and specific vocational training courses, based on skill analysis |
| <i>Somague Engineering</i> (PT) | Private initiative (Somague, private national company, construction sector) | Company level (Somague Engineering) | National (Portugal) | Workers over 45, but also young workers to coach | Valorisation and exploitation of age and experience (Cluster 2) | Age management related practices: coaching sessions; performance evaluation; training; top management involvement and belief |

| | | | | | | |
|---|--|--|---|--|--|--|
| <i>A firm optimising knowledge transmission in the Lorraine region</i> (FR) | Lorraine's ARACT, regional unit of the National Agency for the improvement of working condition | Company level (European leading group in steel products) | Regional (company located in Lorraine) | 350 employees of which 60% aged 50 and over, two thirds leaving the company in 2010, and new young workers | Knowledge transmission between generations (Cluster 1.2) | Diagnosis of the knowledge transmission processes; individuation of good practices; their implementation |
| <i>Transfer of knowledge into a non-profit organisation</i> (DE) | Management and employees associations, as well as the employees of the "Lebenshilfe Bremen e.V." | Organisation level | Regional | 450 employees, women ca. 60%, men 40%, both young and old | Knowledge transmission between generations (Cluster 1.2) | Mentoring; exchange of knowledge from more experts to young; evaluation of the competence of the other group |
| <i>AQUA_mark: Good policy practices for companies and employees in small- and middle-class businesses</i> (DE) | Agency mark GmbH in the city of Hagen, an official, operational and individual advisory service from demography consultants, executives from health insurances, Chambers of craft and employees associations | Company level: small- and middle-class companies (250 employees) | Regional (Mark region) | Management | Age management, implementation and systematisation of staff-development strategies (focus on both sexes employees over 40 with no training in the last 10 years threatened by unemployment) (Cluster 2) | Assistance to management; advisory services on lifelong learning and personnel development; |

Two more practices involving enterprises have been individuated. Another angle under which it is possible to classify the policy practices individuated by the national partners of SPReW, consist in considering the **type of initiator**. The characteristic of the examples reported in the following table is indeed the particular type of initiator, which is *technically private* for both of them. Nevertheless, the *non-profit organisations* in question, for their characteristics, their components and their aims, can be collocated at an intermediate level between the public and the private ones. As for some of the practices schematised above, also the ones below represent the outcome of fruitful collaboration among different subjects, with several and often complementary specificities. The approach privileged by these initiators, which are mixed and various, follows a more transversal perspective. The practices have a wider ground of implementation, involving more companies and more levels at the same time – study, research, projections, potential. The aim is common, promoting entrepreneurship, in the general view of fostering job integration. But if in the above mentioned practices the main

issue was represented by age management, and the attention was mainly focused on the older generation, in those below the problem of youth employment seems to be tackled here with a certain degree of specificity. The entrepreneurial initiatives are meant to be targeted to young people, even with the support and the guidance of the older.

| Policy practice | Type of initiator | Level of implementation | Extension | Target group | Aim | Tools |
|--|---|--|---------------------|--|--|---|
| <i>Project AUDAX - support and promote the entrepreneur spirit mainly in family companies</i> (PT) | AUDAX, non-profit association of academics with strong connection with the entrepreneurial sphere, many of them integrated in important companies | Scientific, academic and entrepreneurial communities | National | Entrepreneurs of any age and individuals involved familiar businesses. | Study, support and promote the entrepreneur spirit, the systematic innovation and the sustainable self-employment and entrepreneurship (Cluster 1.3) | Promotion of research, training, consultancy |
| <i>Wallonie entrepreneur</i> (BE) | Wallonie Entreprendre, a non-profit organisation launched by entrepreneurs willing to contribute to the economic redeployment of the Walloon Region. Supported by the Walloon Union of Enterprises. | Potential “companies” | Regional (Wallonie) | Young entrepreneurs with a defined project of investment | Support emerging projects with an economic and a job creation potential; support knowledge transfer and sponsoring activities between established companies and young entrepreneurs with a defined project (Cluster 1.3) | Evaluation and sponsoring of projects; integration of emerging companies in local economic networks |

Other practices implemented at company level provide a “mixed” type of initiator. In the ones briefly schematised in the table below, the initiatives can mainly be defined as *public*. Nevertheless, the participation of bodies and subjects that are considered as private in certain countries, gives the measure of the “contamination”, which is a positive factor, by the private initiative, arising mainly from the employers’ and entrepreneurs’ side. Regional public institutions, provincial public authorities, Municipalities, Chambers of commerce, tourism, agriculture and industry, educational institutes (schools and universities) collaborate with employers’ organisations, associations of enterprises, private consultancies, single industrial companies. The practices are implemented at regional level, showing a high degree of connection between the collocation of the actors involved and the territory. With regards to the type of initiators, a remarkable element is represented by the absence of the employees’ organisations, whose intervention, if there has been any, has not been reported.

The first two Italian practices are designed to the clear aim to promote self-employment and the creation of new entrepreneurial activities, aimed at the integration of young people in the labour market, in the view to create youth employment opportunities. The intergenerational component is given by the method, which represents also an aim itself, they follow to pursuit this goal: the transfer of knowledge, experience and know-how, which is again a recurrent positive theme, from the older experienced entrepreneurs. The project “*Mothers-daughters*” also presents, *unicum* in this collection, the gender component.

The two following practices are more aimed at gathering and sharing positive experiences in the implementation of age management strategies, to retain older workers and to profit of their experience as “teachers” of the younger generations.

| Policy practice | Type of initiator | Level of implementation | Extension | Target group | Aim | Tools |
|--|--|--------------------------------|---|---|--|--|
| “ <i>Mothers-daughters</i> ” mentoring in Tuscany for the start up of new female entrepreneurship (IT) | Tuscany Region, Sector of Social Responsibility and Equal Opportunities, and Unioncamere Toscana, employers’ organisation | “Potential” company | Regional (Tuscany, Centre Italy) | 10 mother-daughter couples: one expert mother-entrepreneur the “mentor” and one young starting daughter the “mentee” | Support of the public and private institutions for the start up of a female enterprise; Knowledge transfer at entrepreneurial level (Cluster 1.2) | Mentoring, training, counseling about entrepreneurship |
| “ <i>Hand</i> ” project – traditional and ancient professions for new employability in Basilicata Project “ <i>MANO</i> ” (IT) | Chamber of Commerce, Industry, Artisan, Agriculture of Potenza, private consultancy companies, public Municipalities, Chamber of Tourism | Company | Regional (13 Local authorities of the Basilicata Region, Southern Italy). | 30 employed young people in precarious jobs and/or unemployed ; older workers with an traditional – ancient profession near to be become pensioners or near to close their activity | Raise employability both of the young and the older workforce expelled from the labour market picking up and recognising, redeveloping and giving new social recognition to the traditional professions. (Cluster 1.3) | Intergenerational exchange and transfer of ancient professions |

| | | | | | | |
|-----------------------------------|---|---------|---|---|--|--|
| <i>Vuurtoeren45+</i> (BE) | Network of enterprises and public organisation: Chamber of Commerce of West Flanders, local member of VOKA (association of the Flemish employers' organisations); support by provincial public authorities; University of Leuven | Company | Regional (Bruges and the coastal region) | Employers and employees, enterprises; human resources managers and training managers in companies within 30 partner companies or organisations | Gather and share positive experiences in the implementation of retention policies for ageing workers (Cluster 2) | Training packages for employers and employees, at the enterprise level; virtual network (online forum) and a physical network (periodic meetings) of concerned workers and stakeholders. |
| <i>Knowledge pool 50+</i> (BE) | Chamber of Commerce of West Flanders AND co-funded by ESF; Provincial industrial high school; Randstad Interim; VOKA (Flemish federation of enterprises); Four industrial companies: Proviron, Bekaert, Thermote & Vanhalst, Deceuninck Plastics) | Company | Regional and local (West Flanders) | 50+ experienced workers, volunteers, | Find out how aged workers can be better integrated in work, both in a profitable way for the companies and in a satisfying way for themselves. Give older employees an active role in the transfer of explicit and implicit knowledge by giving them a role of "experts" and trainers (Cluster 2) | Long term training in knowledge transfer; making older employees become "experts" and trainers for their younger colleagues |

Other policy practices individuated have been initiated and promoted by public bodies and institutions, intended in the widest sense (i.e. public organisations, foundations, research institutes). The table below offers an overview of the policy practices, which have been promoted at different levels, which have in common the **public intervention** as a starting point.

The first two practices listed have in common the aim of raising awareness on intergenerational issues. The interesting feature here is represented by the level of

implementation, and the target groups. On the one hand, in the Belgian case, the aim is pursuit involving different social actors as well as researchers and practitioners, in order to open a wide open debate on the topic. In the case of Hungary, the target is represented by companies of any size and sector, which are therefore involved in an awareness process that they did not initiate but in which they play a key role.

Also the other practices involve the company level as a ground of implementation. The extension, mostly national, seems to be, in these cases, the feature, which also differentiates the public initiatives from the above-mentioned ones. The aims are mixed again: the promotion of new approaches to age management is present; the question of job integration, in particular the creation of job for young workers, profiting of the experience of the older ones, is treated as well. A new approach is adopted by the Hungarian awareness raising policy practice, which considers the issue of the reconciliation of work and family life, which mostly affects the young generation. The concern for low skilled young facing the difficulty to enter and stay the labour market is also expressed by the public initiators.

| Policy practice | Type of initiator | Level of implementation | Extension | Target group | Aim | Tools |
|--|--|--------------------------------|-----------------------|--|---|--|
| <i>Ageing population and intergenerational relations</i> (Be) | Public initiative (King Baudouin Foundation, independent public benefit foundation) | National | National (Belgium) | Researchers, practitioners, actors from the civil society, social actors, public authorities, citizens | Support a better understanding of intergenerational issues through stimulation of public debate (Cluster 1.1) | Thematic seminars; financial support of a think-tank, studies and projects aimed at better intergenerational relations (i.e. cooperation, reciprocity, mutual knowledge) |
| <i>Family Friendly Workplace award</i> (HU) | Public initiative (Ministry of Labour and Social Affairs) | Company | National (Hungary) | All employers in Hungary, regardless their size or field of operation | Collect information about and evaluate policies to promote reconciliation of work and family, existing on a company level across the country (Cluster 1.1) | Awarding companies which promote family-friendly working environment |

| | | | | | | |
|--|---|------------------------------------|---------------------------|--|---|---|
| <p><i>The mentoring scheme of young people towards employment</i> (FR)</p> | <p>Public initiative (Network of local agencies (missions locales, ML) and the advisory, information and guidance centres (permanences d'accueil information orientation, PAIO))</p> | <p>National, regional, company</p> | <p>National (France)</p> | <p>Young low skilled below 25, facing discriminations or difficulties in entering the working life</p> | <p>Tackle young people's difficulties (due to low skills, social background, discrimination based on age and origin, lack of social capital and network); help them in finding a good job or a training scheme, and staying in the firms, thanks to mentors who can share their work experiences and networks (Cluster 1.3)</p> | <p>Personalised help and guidance of young people given by voluntary and unpaid « mentors » (parrains) who are still working or who are retired</p> |
| <p><i>Fund for professional experience</i> (BE)</p> | <p>Public initiative (Fund for professional experience depending on Federal Ministry for Employment, labour and social dialogue (SPF Employment), directorate "Humanisation of work")</p> | <p>Company</p> | <p>National (Belgium)</p> | <p>Ageing workers (45+)</p> | <p>Improving working conditions of 45+ workers, encouraging initiatives allowing to acquire new experiences, or to enhance the value of their professional experience; ease the transfer of experience between generations at work; make the workplace more attractive for older workers; encourage companies to be aware to the elder's working conditions (Cluster 2)</p> | <p>Subventions to concrete projects on ergonomic and organisation adaptations, to improve the ageing worker's work conditions, on demand of the companies</p> |

| | | | | | | |
|--|---|-----------------------------------|---|---|---|--|
| <p>“Start again after 45” (IT)</p> | <p>Public initiative (Piedmont Region, with the financial support of the ESF)</p> | <p>Company and organisational</p> | <p>Regional (Piedmont , Northern Italy)</p> | <p>70 employees over 45 years old employed in 12 organisations based in Piedmont Region</p> | <p>Implement new organisational culture and new hr management, to emphasis and ameliorate the professional competencies and abilities of the older workers (Cluster 2)</p> | <p>Meetings and trainings with hr managers, counselors, older workers; diagnostic actions on age management; planning of better actions;</p> |
|--|---|-----------------------------------|---|---|---|--|

As final remarks, we can say that the collection of good policy practices made by the national partners, shows that it is possible to tackle the same issues and pursuit the same aims at different levels, obviously with different approaches. The main issues considered assume, in fact, several connotations and the solutions are tackled in varied ways depending on the level of implementation and the type of initiators.

The description in depth of the policy practices will allow a complete overview of the initiatives enacted. At this point, it is possible to briefly summarise the different aspects of intergenerational relations that the practices treat.

Age management is a theme, which is, tackled at all the levels and by all the initiators, as a consequence of the demographic change which affects the whole society. At national level, initiatives aims at the implementation of a new organisational culture, at assessing, emphasizing and ameliorating the professional competencies and abilities of the older workers, in order to facilitate their personal recognition and to benefit of their experience and know-how. The company approach seems to be more practical. Not only older workers are targeted: target groups are constituted also by human resources management representatives, who need to develop and apply new approaches and decisions with regards to the older generation. In those practices, which have been initiated by public subjects, the problem is also faced under the point of view of the research, of the comprehension of the mechanisms connected to age management, of the awareness raising in order to spread the knowledge acquired and the good practices.

Youth related issues are tackled under the double perspective of integration in the labour market and retention on it. Private initiatives tend to treat the problem of youth unemployment and scarce integration by promoting self-employment and entrepreneurship. The support of more experienced and aged workers seems to be fundamental. At company level the integration of young people seems to be pursuit by knowledge transfer models. Within public initiatives, the issues connected to the youth situation gain also a familiar dimension, whereas public practices encourage companies in setting family-friendly models of work organisation. Another concern of the public initiators is represented by the difficulty of low skilled and discriminated young people to enter the labour market. The “mentoring” scheme is proposed as a solution, valid, by the way, also at company level.

The **gender perspective** is almost absent.

5. First cluster: Intergenerational good policy practices

5.1 Overview

“Confronting the ageing of the existing workforce” means taking into account that the coexistence on the workplace of different generations working together does not always occurs in terms of convergence and social cohesion. On the contrary, the qualitative research carried out at national level has underlined that the process of integration among generations, which is at the base of both occupational and economic growth and social cohesion, is not always easy, being some difficulties either expressed or not. However, the present collection of good practices represents a collection of examples at policy and action levels through which it has been possible to foster social cohesion with regards to the intergenerational dimension.

The practices addressed both to young and older generations have been here classified into four different groups, as tackling different patterns for enhancing intergenerational social cohesion.

The first group of good practices regards the aspect of **raising awareness on intergenerational issues at work**. A common problematic aspect emerged from the qualitative analysis carried out so far underlines that often age and generational related issues in the work place are not spontaneously raised. Within the work context, they function as a taboo, with people not always willing to debate them. However, unspoken and un-debated issues of a society are very frequently central ones for it. The practices filed in this sub-group respond to a general exigency of taking into consideration the topic in question at all the possible levels, from the national to the local or company ones. Building awareness represents the pre-requisite to look smooth intergenerational relations and set cohesive measures on the workplace. Only taking into account the existence of the intergenerational dimension, in fact, may help policy makers, company management, social partners as well as workers of different ages to be conscious of it and develop the right attitude to take mutual advantage of it.

As a step further, the second sub-group regards good practices in the field of **knowledge management** and in particular **knowledge transfer between generations**. In the previous part of the research it has been underlined that this aspect represents the main pillar of the dimension of cooperation within intergenerational relations. In almost all the countries, in fact, when set in the context of work relations, intergenerational cooperation was expressed mainly in knowledge transfer, and apprenticeship with older generations. Even without explicitly mentioning the cooperation, in all the countries cases of knowledge transfer are reported. In general, from the practices provided at national level and the qualitative analysis, it is possible to identify several dimensions of knowledge transmission. Knowledge transfer may include: informal knowledge about the history of the company and the operation of a department, which transcends formal function description, and sometimes happens informally; professional knowledge of the technical and formal type; practical and procedural information. Knowledge transfer is important in all these three spheres in order to smooth relations and mutual approach.

In the French experience in particular (but not only) active cooperation between young employees and their more experienced seniors is remarked to be the most frequent situation,

clearly over-passing competing situations. This kind of cooperation is mainly realised at company level, but a company initiative can be helped by public bodies specialised in the field³.

Also the Italian partners report how the transfer of professional competences and know-how from a generation to another represents the main ground on which policy practices addressing strictly intergenerational relations are dealt with. The Italian good practices report also signals that the transmission of skills continues to happen more frequently and easily in more traditional sectors, such as metal industry and construction (activities from the industrial sector, mainly).

The knowledge transmission is considered the only specific intergenerational practice also in Hungary. Nevertheless it is a recognition of good practice *a contrario*, as the partners clearly state that companies fail to utilise the experience and the competence of older employees, by organising knowledge transmission between generations, and there are very few examples of older workers taking part in the training of their younger colleagues. This is clearly connected to a sociological aspect related to the regime change, which has created a fracture between the old and the young generations also in terms of mutual respect and consideration.

This kind of good practices may represent a proactive pattern in order to increase cooperation between the younger and the older generation, and, in a broader perspective, improving the level of social cohesion. It can be an important method for example in the re-evaluation of the experience of the elderly, motivating them in virtue of their acquired knowledge; on the ground of the management of the polarity between experience and innovation, often seen as an undiscussed advantage, as fighting the stereotype that older workers, often less skilled than younger in the use of IT, are less valuable in spite of their matured experience on the job. In a climate of insecurity, of fighting for places, sharing the knowledge offers a positive ground to smooth the mutual relations. In this perspective, of course the intervention of the company cannot be limited to the arrangement of the physical space and the constitution of groups with a mix of ages. Instead, the company must also contribute to creating conditions favourable at the level of everyday organisation of the activity (particularly by easing pressure) so that a dynamic of cooperation can come into play between the generations.

Two of the practices grouped here⁴ could have also be reported in the following sub-group, among practices aimed at increasing job integration: in fact, aspects of knowledge transmission can also be relevant with regards to job integration, as highly involving the age groups in mutual exchanges proactive for both. It is the case of the Italian project “Mothers-daughters”, interesting also with regards to the gender aspect, as unique example in the present collection in which gender is considered also under the generational perspective, in the framework of work.

The third sub-group collects good practices aimed at **job integration**, meaning here both integration in the labour market and, more specifically, self-integration on the workplace. In

3 In France, however, younger are less protected by the new laws, so passing on knowledge to them may be easier and less conflictive than in other countries (WP3 Synthesis Report)

4. “Mothers- daughters” Mentoring in Tuscany for the start up of new female entrepreneurship (ITALY); “Hand” Project – Progetto “Mano”, Traditional and ancient professions for new employability in Basilicata (ITALY). The first one has been reported among the knowledge transfer practices, the second one among the practices aimed at job integration.

two reported cases, the integration, the recognition of a position in the labour market and within a certain field of activity is basically realised through the acquirement of the knowledge, which derives from the older generation⁵. Beyond the practices of mentoring (Portugal, France) reported here, other examples of job integration through the intergenerational cooperation can be found at national level. One is provided by the Italian partners: an intergenerational Solidarity pact has been instituted under which employers aged 55 and above may volunteer to convert their labour contract into a part-time contact, and young job-seekers or unemployed people are simultaneously recruited under part-time labour contract. However, such practices require refined evaluation because experience shows that it can result in an increased inequality between generations, with the multiplication of part-time work for young workers, sometimes temporary, (with part-time salary) and more comfortable status for older workers with part-time work (with part-time salary plus additional benefits) (example of the Tandem plan in Belgium).

The last sub-group of this cluster regards **relations at work**, managed in an intergenerational approach. The practice reported here shows a well targeted approach and aims at discussing the issue of the relations between generations in order to smooth them.

5.2 Awareness raising

5.2.1 Ageing population and intergenerational relations (King Baudouin Foundation) (Belgium)

Public initiative developed at national level

General presentation

“Ageing population and intergenerational relations” is a global project developed by the King Baudouin Foundation. It concerns different dimensions of the ageing issue. The initiative is motivated by some trends in the Belgian society that are, obviously, common trends to many European countries: increasing life expectancy; reduction of the young working population; increasing part of aged people; diversification and complexification of life-courses... Taking such context into account, the King Baudouin Foundation states that the relations between generations are no more obvious but remain important to ensure social cohesion, solidarity and social equilibrium.

Four types of initiative were launched in 2006:

- The first initiative is the organisation of three thematic seminars aiming at stimulating a public debate among researchers, practitioners and actors from the civil society; one was dedicated to intergenerational cooperation in work.
- The second initiative is the organisation and the financial support of a think-tank gathering civil society representatives and social actors. The aim is to formulate concrete recommendations to face the challenges of the changing Belgian society.

5. It is the case of two Italian practices, “Mothers – daughters” and “Hand” project, filed in the previous sub-group regarding knowledge transfer

- The third initiative consists of a financial support to projects that “foster better relations, cooperation, reciprocity and better mutual knowledge between generations”. The King Baudouin Foundation wants to support new initiatives and ongoing projects but also to bring out exemplary initiatives.
- Additionally, the KBF support studies aiming at identifying the consequences of the ageing population in Belgium. They consider social vulnerability and justice issues with a specific attention.

Obviously, the general issue of the whole programme is “Ageing population and intergenerational relations.” Ageing is a key work in the programme and only a part of the activities have to do with generations at work. Nevertheless, this global initiative is interesting because it focuses on the intergenerational dynamics rather than targeting only one generation. It contributes to raising awareness on the dialogue and cooperation between generations rather than dealing with age groups in a separated way. Such contributions can foster social cohesion.

Type of initiator

The King Baudouin Foundation was founded in 1976, when Baudouin I (1930-1993) celebrated his 25th anniversary as King of Belgium. It is an independent public benefit foundation. The Foundation works on an independent and pluralistic basis. The Foundation is active at the regional, federal and international level.

The mission of the King Baudouin Foundation is clear and at the same time wide-ranging: to help to improve living conditions for the population. The Foundation focuses on specific themes: migration and multicultural society; social justice and poverty; civil society and social commitment; health, philanthropy; the Balkans; Central Africa.

It combines various working methods: support for third party projects (individuals, groups, institutions, organisations etc.); organisation of public events (seminars, workshops, conferences...); exhibitions; etc.

For 2006 the King Baudouin Foundation had an annual budget of approximately 40 million Euros. In addition to the large grant from the National Lottery there were donations, legacies and the funds set up by individuals, associations and companies, Government missions, partnerships and project accounts

Target groups

The initiative aimed to raise awareness among researchers, civil society, social actors, public authorities and citizens on intergenerational issues. The target groups of the Foundation are citizens and actors that could relay this interest in their own activities.

Tools

In order to support a large public debate, the Foundation has organised three *seminars* focusing on challenges for the future regarding intergenerational relations and solidarity in different social fields. Among the three seminars, one was dedicated to generations at work:

- How to foster intergenerational relations? (2006)
- A public space fostering intergenerational relations (2007)

- Intergenerational cooperation in work: a response to demographics challenges (2007). This seminar gathered contributions on the following topics: the role of enterprises; organising intergenerational cooperation at work; concrete experiences.

The *think thank* “relations between generations” is a learning network that gathers people active in associations and social actors. The purpose is to think together to the challenges of ageing and intergenerational relations and to suggest actions.

This *financial support* concerns groups of citizens, associations, social services, local authorities, institutions, trade unions, etc. that want to develop concrete intergenerational approach. The Foundation asks for projects gathering two or more generations. The purpose is to support a better understanding of generations, and particularly to keep a place to ageing people in society.

The first call for tender was launched 2006. 90 projects were selected. A second call took place in 2007 an 82 projects were selected and they will start in January 2008. Not all of those projects concern the work dimension but companies, professional associations and trade unions were explicitly invited to submit. Obviously, this first set of projects mainly concerns youth and small children, and retired people. A small number of the projects are in the professional area.

The support is from 1 250 euros to 10 000 euros. The total budget of the Foundation for this tool is 400000 euros each year.

Duration of the action

The practice started in 2006 and projects selected in the second call will start in January 2008 for a maximum duration of two years. Moreover, the KBF plans to maintain its support to research and think-tank activities in the near future.

A synthesis event is planned in 2008. It will propose a feedback on all the activities.

Sources

<http://www.kbs-frb.be>

Other relevant aspects

Here are some examples of micro projects supported by the Foundation for the year 2008. All of them concern initiatives in the work field.

- A non-profit organisation in the Walloon Region will collaborate to create a website that gather professional knowledge of senior workers. The target group of this website is the young workers.
- The Institute for health and safety at work will support knowledge transfer (from experienced to young workers) about health and security on the workplace. The aim is to raise young workers’ awareness on those issues and to support collaboration between generations.
- Building a human resource policy that takes into account the age dimension and the specific knowledge of age groups.

- Starting a senior club that will sponsor candidates that want to take over family businesses.
- Senior entrepreneurs help young workers to launch their project.
- Knowledge transmission from senior workers to young workers.

5.2.2 “Family Friendly Workplace” Award (Hungary)

Public initiative developed at national level

General Presentation

The award Family Friendly Workplace was established in 2000 by the Ministry of Labour and Social Affairs, following German, Irish and Dutch examples, but adapted to Hungarian conditions. The Hungarian competition was designed through the co-operation of trade union confederations, the Hungarian Chamber of Commerce and Industry, the Hungarian Chamber of Agriculture, as well as several women’s organisations.

The main goal of the Ministry in launching this competition was to collect information about, as well as to evaluate, policies, which promote reconciliation of work and family, existing on a company level across the country. The characteristics of a family friendly workplace include providing appropriate working conditions, allowing some degree of flexibility of working time, understanding toward family obligations, providing opportunities for professional advancement, and various allowances.

During the evaluation of applications, the following points are taken into consideration:

1. Flexibility in working time. Possibility to work flexible hours, part time, telework.
2. Training, education. Training provided during working hours so that the family member does not have to separate from the family or programmes are provided for the family members during the training.
3. Promoting return to the world of work after the birth of the child. Providing part-time or flexible working arrangement, or the possibility to participate in project work; promoting contact between the parent with a small baby and the company/colleagues in order to remain in the information flow and not to lose professional and personal contact. Certain legislative measures have been drawn up to this end.
4. Day-care facilities for employees’ children. Several companies operate such facilities; others may contribute to the operational costs of such a facility. Companies might come up with alternative solutions for day-care as well.
5. Leisure programmes for the employee’s family, holiday schemes. There is a wide range of company events and programmes, organised by the employer for the entire family, which provide a chance for colleagues and their families for bonding. Holiday schemes could be tailored to the needs of employees with families, which also take into consideration school breaks.
6. Health and working conditions. Besides eliminating health risks at the workplace, employers should also do their best to promote healthy life-styles as well through showing best practices and their implementation. With regard to the quality of life of the

employees, it is important that the employer make preventive steps, in addition to providing appropriate working conditions and work safety.

7. Allowances – there can be a wide range of allowances, provided by the employer, used as incentives. Employers have a great space for action in this regard and can tailor allowances to the needs of employees.
8. Job security, rights, industrial relations. Providing information about the rights of the employees, working conditions and their changes; dialogue between employer and employee.

Type of Initiator

Hungarian Ministry of Social Affairs and Labour

Target group

All employers in Hungary, regardless their size or field of operation.

Motivation

The goal of the Family Friendly Workplace competition, through recognising and making public outstanding good company level practices in relation to reconciling work and family life, is to increase social responsibility and competitiveness of employers.

There have been more than 400 competitors in the past years including employers of various sizes from all over Hungary, with a wide range of fields of operation: micro-enterprises, large corporations, local government offices, hospitals, libraries, etc..

Tools

The award Family Friendly Work place is awarded to four employers every year and additional awards are distributed as well. The list of winners is made public in the media. The title is held by the employer for a year.

Applications are evaluated by a professional commission whose members include representatives of the Ministry, representatives of employers and employees, as well as of non-governmental organisations. Winners are announced in four categories:

- governmental organisations and non-profit organisations;
- small enterprises;
- medium size enterprises;
- large enterprises.

Beside the winners, outstanding initiatives are also recognised.

Duration of the action

Ongoing.

Sources

Hungarian Ministry of Social Affairs and Labour: www.szmm.gov.hu

5.3 Knowledge transmission

5.3.1 “Mothers- daughters” mentoring in Tuscany for the start up of new female entrepreneurship (Italy)

Public initiative developed at regional level (This practice, for the reasons exposed before, could also be filed in the subgroup regarding job integration practices).

General presentation

Although the role of the family and the network of relevant relationship seems to be very important for Italian female entrepreneurs more than male entrepreneurs for support of the start up phase of their enterprise, the female entrepreneur ask also support to the social partners both to the employers' organisation than to the trade union. This proves on one side, how important the family still is but on the other side how increasingly important are becoming the support of the public and private institutions for the start up of a female enterprise. The support family and of the network for the Italian entrepreneur is important in terms of cultural resources, in terms of strong bonds, in terms of stability and equilibrium.

The strong motivation, strong will and good professional competences of the female entrepreneurs are not always sufficient to overcome some barriers in the activity as entrepreneurs such as the recruitment of new capital, the acquisition of new clients, the lack of services, the bureaucracy of the many activities, the difficult to reconcile family life with working life.

For these reasons the Toscana Region has given a particular importance to the female entrepreneurship in different productive sector both in the service sector than in the food industrial one. In these sectors more and more women are becoming entrepreneurs.

The project “Mothers and Daughters” has the aim to build a permanent network of women, “mothers” and “daughters” which themselves can become one day also mothers of new “daughters” ... starting therefore a self growing network of female entrepreneurs.

This network of female entrepreneur is build thanks to a specific policy practice, which is called “mentoring” between a “mother entrepreneur” and a “daughter-entrepreneur”.

Mentoring is a technique that supports and accompanies a vocational training process where an expert entrepreneur (the “mother entrepreneur”) transfers her know-how, expertise and professional competencies as an entrepreneur to a young “daughter entrepreneur” who wants to lean this specific profession: become a an entrepreneur. Mentoring has been utilised to favour the start up of a new entrepreneurship by women, transferring know-how, expertise from the phase of the training to the development f the enterprise.

Thanks to the mentoring many female entrepreneurs have been supported in their training because they have learned from other women entrepreneur which were already successful entrepreneurs in different fields such as: consultancy company, kindergarten, beauty centre, commercial activities etc.

The exchange of competencies and information between “mother entrepreneur” and “daughter entrepreneur” is favoured in an atmosphere of mutual respect and esteem that brings at the to build a new enterprises (that of the daughter entrepreneur) but also to a strong collaboration

with the enterprises. The mentoring process is principally based on a relationship of trust, strong feeling and complicity between “mother entrepreneur” – the mentor - and “daughter entrepreneur” – the mentee -: mother and daughter must select them selves on the bases of trust.

The specific aims of the project were:

- Help the development of different model of entrepreneurship. To help an enterprise to grow and to develop itself it is important to have a “model” to follow. Since today the model are always male models;
- To increase in terms of quantity and quality the development and the stabilisation of female enterprises;
- To define a entrepreneurial female culture that highlights the richness of the human resources invested and the “female” abilities and companies such as: the capacity of relationship and organisation, the openness to learning process, the flexibility, the attention to the Other;
- To show the problems and difficulties that women entrepreneur can find when they start a creation of a new enterprise in order that these obstacles don’t become impossible barriers that discourage young entrepreneur to start a new enterprise or even to hinder new business.

The mentoring process will be divided up in different modules:

- *First module.* In the first module the aim of the project was presented and also the definition of mentoring was explained as a personalised and long term relationship between a mentor, a successful female entrepreneur, and the mentee, the young entrepreneur who will be accompany by the mentor in her training process to learn to become an entrepreneur. For this it will be also necessary to make also an analysis of the individual competencies of the mentee and of the specific needs in each field.
- *Second module.* In the second module it was been taught the different roles of mentoring: the mentor, the mentee, the facilitators. This was learned thanks to those who have already experiences the mentoring process before. Thanks to focus group and simulations the mentors communicated their own female model of entrepreneurship to the mentees and the mentees expressed the expectations and the needs for her new profession. This exchange of information is necessary in order to select her mentor. The facilitators – expert in the field – help the building of the best couple – mother entrepreneur (mentor) and daughter entrepreneur (mentee) – highlighting the
- *Third module.* This module has the aim to build the couples mentor-mentee, to start the mentoring process and the definition of a work contract and an action plan between mentor and mentee.

The module also approached the following topics:

- Gender approach and reconciliation between working life and family life for the construction of a model of entrepreneurship;
- Analysis of the specific characteristic of the mentee; analysis of the enterprise that the mentee want to build up; agreed definition of the needs in terms of information, vocational

training, consultancy; the definition of a network of professional relationships for the mentee; definition of a work contract between the mentor and the mentee in terms of mutual rights and duties for the accompaniment of the starting and development of the consolidation of the new enterprises; the definition of a daily work programme; instrument for a final evaluation and feed back.

Type of initiator

The initiator of this project is the Tuscany Region (Centre Italy) and more precisely, the Sector of Social Responsibility and Equal Opportunities and an employers' organisation called Unioncamere Toscana

Target groups

10 mother-daughter couple: one expert mother-entrepreneur the “mentor” and one young starting daughter the “mentee”. For each couple was foresaw a third professional – the facilitator – which helped and guided the mother-daughter during the project.

Tools

The Tuscany Region made a strong dissemination of this project trough out the Region

The main tools utilises where leaflets but also promotion on the different website such as those of the Tuscany Region and the Italian public television (Rai).

Duration of the action

The duration of this active labour market policy have been one year (2004-2005).

Feedback

The young entrepreneur have been accompanied in their training process from the start up to the development of the enterprise.

The results that have been positive and are the following one:

- 83% of the mentors declared their satisfaction;
- 80% of the mentees declared their satisfaction.

The overall evaluation pf the facilitator were positive. The 67% of the facilitator seemed satisfied by the relationship between theory and practice.

Motivation for selection

The motivation of selection is threefold. The first motivation concerns that this project supports the female employment and in particular the female entrepreneurship which is particular important for Italy since it is one of the European countries with lowest of employment rate and in some regions very far form reaching the objectives of the European Council decided in Lisbon of 60%. The second motivation is due to intergenerational dimension of this policy practice, which fits in the main research objectives of our project. The third motivation for selecting this policy practice is that one of the results of the Wp3 (mainly in the focus group) put a great emphasis about the importance to receive a training in

the beginning of once career, to be supported at the beginning of the career which seem not to be the case anymore for the younger generation.

5.3.2 A firm optimising knowledge transmission in the Lorraine region (France)

Public and private initiative developed at company level

General presentation

A company producing steel and located in Lorraine tries to improve the process of knowledge transmission between generations. This company belongs to a European leading group in steel products. It employs 350 workers. Although the company hired young people during the last years, the workers' population is still ageing. Thus, 60% of the 350 employees are aged 50 and over, and two thirds of the workers will leave the company in 2010.

This company is specialised in high value-added products, and the mastery of the production process requires high technological skills. The development of this company has relied on 3 levels of culture: a professional culture, based on guilds, a skill culture, and a managerial culture to stimulate progress at all levels of the company.

This company with ageing workers faces the risk of knowledge's loss. It has attempted to optimise its resources and facilitates process of knowledge's handing down on the ground.

One of the company's management departments had doubts about the efficiency of its methods of knowledge's transmission and capitalisation. In the perspective of a predictable loss of specialised skills, the management dreaded the risk of performances' deterioration. The management was wondering how to reinforce and to make transmissible a collective knowledge that is fragile. That's why the management welcomed the Lorraine's Regional Agency for the improvement of working conditions, the ARACT (Agence Régionale pour l'Amélioration des Conditions de Travail) in 2003-2004 in order to support the reflection in the framework of a European project.

Type of initiator

The Lorraine's ARACT is a regional unit of the National Agency for the improvement of working condition (ANACT, Agence Nationale pour l'Amélioration des Conditions de Travail). It is a pluridisciplinary team (ergonomists, sociologists, economists...), which intervenes with companies in order to help the implementation of projects aiming at reconciling economic performances with job quality.

Its interventions can be diversified: it can support a project over a long or short period, thanks to tools and methods for leading projects and following working groups. It can evaluate the effects of the project. It can also intervene before the projects' implementation, during a stage of studies and diagnosis, which should clarify the goals, stakes and context of the projects. Its interventions contribute to the building of the project, by involving workers in the phase of diagnosis, and in the search of solutions and compromises. The ARACT can also initiate and lead training devised with the company's actors and outside contributors on the themes link to working life (health, working conditions, social dialog, skills upgrading, organisational change...).

Motivation

In the present context, the mass retirements, combined with some difficulties of recruiting in some sectors cause a risk of losing skills, and make the question of knowledge transmission between generations more acute. This question, although said to be a major concern in the managerial rhetoric, is rarely integrated into projects, nor translated into an explicit policy able to facilitate exchange between generations. The stake is frequently under-estimated by managers, and becomes urgent when the experienced workers are leaving. This situation is all the more regrettable since a reflection and a project on the knowledge transmission can benefit both the workers and the company.

Tools

The intervention of ARACT began by a phase of diagnosis, with 46 interviews led by 2 steering committees. One committee, created at the central level, aimed at understanding the global context, the environmental pressure, the stakes, the challenges and the clients' demands. The other one was created at the level of the production site, in order to understand the organisational and production processes, the challenges of the human resources management, and the role of the actors.

Thanks to the groups and individual interviews, 36 “good practices” on the knowledge building and transmission has emerged. These practices were evaluated on the ground, for a specific sector. A feedback from the management allowed the improvement of some practices.

The analysis of the 36 good practices allowed to understand the acquisition of individual skills, collective skills, and shared skills in eight different work situations. The tool thus shed light, for the management, on the efficiency of the diverse existing schemes of transmission and the means on the ground, at the level of the work collective.

During this second step, the intervention focused on the observation and analysis of work. This observation allowed spotting the role of actors: the role of the managerial line (the managers and the delegates) on the one hand and the role of key actors in the technical support line on the other hand.

The analysis led to the modelling of the interaction between the two kinds of actors. It shed light on the determining function of the interface between the technicians and engineers working during the day and the operators in shift work, in 5 teams. This key role can be fulfilled by an experimented senior or several seniors, few years before they leave the company.

Lastly, the ARACT organised a discussion between the two complementary lines of actors during a one-day seminar. Every actor became aware of the role and knowledge of the other actors. Thanks to the modelling, they could imagine how they can transfer to the other activities areas knowledge about relevant solutions in the observed activities areas.

Feedback

The ARACT's intervention sheds light on the importance of a good organisation of knowledge transmissions and the definition of the tasks of the actors in the operational line and the technical line.

It aims at transforming factual, real and unconscious skills into a conscious knowledge that can be useful for everybody. It leads to complement existing resources, to make these resources more accessible, and to bring key actors round to thinking about knowledge transmission.

At the end of the intervention of a mediator, which was evaluated as positive, the management took the decision to reproduce this initiative, and to extend it to other production areas.

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5.3.3 Transfer of knowledge within a non-profit organisation (Germany)

Company level practice

Target group

Ca. 450 employees, women ca. 60%/, men 40%

Type of Initiators

Management and staff associations, as well as the employees of the “Lebenshilfe Bremen e.V.”.

The project was set for 22 months and was financially supported by the work group Betriebliche Weiterbildungsforschung e.V. Berlin/Qualifikations-Entwicklungs-Management (QUEM). Hereby the external counselling of the project could be financed, which the AIB (Arbeitswissenschaftliches Institut Bremen) had overtaken. The control group, responsible for the organisational execution, the planning and controlling, consisted of the management, the work council, the head of department and AIB. Scientific monitoring by the RWTH (Aachen).

Why?

Senior workers and a low labour turnover, early retirement structures are running out.

- Result: The age structure of the staff is changing in the future and will lead to a growing part of senior workers.
- Result: The growing public pressure for savings and cost reductions lead to more and more young employees getting only limited contracts. Therefore young and old employees agree more and more, that a transfer of knowledge is indispensable.

What?

Forming of two project groups, divided into “old” (over 50 years) and “young” (20-30 years) and according to the period of their staff membership.

Task

To evaluate the competence of the other age group.

Result: the younger ones believe the elderly possess “good biographical knowledge concerning those, who need outpatient care, as well as those living in a nursing home”. The elderly know the structures, work routines and the contact persons.

The project group of the elderly on the other side rank the competences of the younger ones as follows:

- Creative, unconventional ideas and great innovations have an objective view for the necessity of structural changes in the organisation. The younger ones have, compared to the elderly, an advantage when dealing with new technologies. Besides the evaluation of age specific competences, different forms of training for younger and older employees have been tested in various areas. Intergenerational work groups have been formed for the following topics:
 - Building of a “creative centre”
 - Development of structured partnerships/Mentoring
 - Development of a model for further internal training among colleagues
 - Development of a model for securing competences
- One work group concentrates, under the topic of maintaining qualifications and transferring knowledge between the young and the elderly, on solutions for the retirement of the elderly.

When?

December 2004 – October 2006. The project has had a runtime of 22 months and has finished. The developed work and learn methods continue though.

Outcomes

The younger ones always had and still have difficulties to enter working areas of the elderly. Customs and proven structures cannot be changed overnight. The project „corporate learning from older and younger employees“ from the „Bremer Lebenshilfe“ takes a very participative approach and was converted into the work routine with the participation of all employees. The employees appreciated the project very much ⁶.

Motivation of selection

Even profit organisations can learn from the non-profit organisations like the “Lebenshilfe Bremen e.V.”. On the one side, deadlocked structures and customs can be broken up, by a staffing policy orientated at the employee, and on the other side an open contact, based on the exchange of knowledge, can improve the cooperation between the young and the elderly.

5.4 Job integration**5.4.1 Wallonie Entrepreneure (Belgium)**

Private initiative developed at regional level

General presentation

Started in 2005, Wallonie Entrepreneure supports knowledge transfer and sponsoring activities between established companies and young entrepreneurs who have a defined project of investment. The aim is to support emerging projects with an economic and a job creation potential. In that perspective, they also consider positively the recovery and transmission projects, often neglected in coaching and sponsoring activities.

The sponsors are experienced entrepreneurs who accept to provide free advices and support to starting projects. They are committed: to provide strategic or operational advices; to help the young entrepreneur to fund his project; to open their network and to bring their credibility to the new projects. They will also provide a “moral support” to the young entrepreneur they sponsor. They have to pay to enter the project.

This initiative is featured as complementary regarding to other local or national initiatives that aim to support entrepreneurship. On the first hand, such initiatives have a limited impact because of the lack of experienced personnel to provide an ongoing accompanying of the young entrepreneur. On the other hand, they allow to experienced entrepreneurs to play an active role in the redeployment of their Region.

In that perspective, Wallonie Entrepreneure’s activities are:

6. The example good policy practice was taken in agreement with the works committee of the “Lebenshilfe Bremen e.V.” from the Sammelband Materialien >Demografischer Wandel: Betriebe in demografischen Wandel: Beispiele guter Praxis im Lande Bremen der Arbeitnehmerkammer Bremen. Bremen 2005

- The evaluation of the investment/recovery projects and their redirection to adequate institutions financially supporting entrepreneurship.
- The sponsoring of projects;
- The integration of the young entrepreneurs in the local economic networks.
- All participants (sponsors or project launchers) have to agree to some principles:
- The importance of the individual initiative and engagement;
- The fact that the all exchanges are exempted from payment;
- The reciprocity between young and experienced entrepreneurs.

Type of initiator

Wallonie Entreprendre is a non-profit organisation launched by entrepreneurs willing to contribute to the economic redeployment of the Walloon Region. The project is supported by the Walloon Union of Enterprises. The association also collaborates with a wide variety of organisations supporting entrepreneurship and employment in Belgium.

Wallonie Entreprendre is part of the Entrepreneurship Network created 20 years ago and gathering 31 associations and 2500 entrepreneurs on the French territory.

Target groups

The association aims at supporting young entrepreneurs or company rescuers having a precise and advanced project of investment (financial plan, marketing, staff...) with a job creation potential. The promoters of the project are focused on intergenerational exchanges but they consider that they could benefit (mainly) to young entrepreneurs but also (sometimes) to experienced entrepreneurs.

Tools

Three main tools are developed by the association:

- Recruitment and evaluation: Wallonie Entreprendre regularly organises information sessions about the association's activities and recruitment committees where projects are presented and evaluated (one a month).
- Economical and managerial expertise: evaluation of projects and the identification of possible subsidies to support starting projects.
- Networking: Wallonie Entreprendre also organises a wide range of meeting and activities (sport meetings, cultural activities...) aiming to extend and to consolidate the entrepreneur network.

Possible feedback

After one year of activity Wallonie Entreprendre managed and provided advices about 47 projects in very diverse sectors of activity. Among those submitted projects, 15 have been supported by sponsors belonging to the network. According to young entrepreneurs testimonies, the promoters of this practice evaluate positively the "model of a successful cooperation" they have supported. The main contributions for young entrepreneurs were: the possibility to take some distance with the everyday management of their project, the reduction of their isolation and the possibility to receive concrete and adequate advices.

Sources

The Wallonie Entreprendre website: <http://www.wallonie-entreprendre.be>

The Walloon Union of Enterprises website: <http://www.uwe.be/wallonieentreprendre.html>

Other relevant aspects

- This project is inspired and supported by a French project called « Réseau Entreprendre » (entrepreneurship network): <http://www.reseau-entreprendre.org>.
- This initiative is conceived as a pilot initiative by its promoters. If the evaluations of the projects are positive it will be duplicated in other Walloon cities. Such projects are in preparation in the Walloon Brabant and in the Namur Provinces.

5.4.2 “Hand” project – traditional and ancient professions for new employability in Basilicata (Italy)

Both private and public initiative developed at regional level (For reasons exposed above, this practice could have been filed also in the sub-group collecting practices aimed at Knowledge transfer)

General presentation

The area in which this good policy practice is realised is based North-East of the Basilicata Region on a 819 km². It consists in 13 Municipalities (Comuni): Rionero, Barile, Ginestra, Venosa, Ripacandida, Ruvo del Monte, Rapolla, Rapone, San Fele, Atella, Maschito, Pescopagano e Filiano located on the hills with less than 100.000 inhabitants.

This area is mostly a rural zone. Indeed, almost 23% of the workforce of the area is employed in the agriculture sector although since 1990 other economic sector such the industrial manufacturing and service sector raised constantly.

The presence of two mountain communities (Comunità) such as Vulture-Alto Bradano and Marmo-Platano, shows the existence of areas almost with no buildings, rich of natural resources and landscapes, and with very few economic productive activities and with no economic valorisation projects.

The generational change is strong especially in some Municipalities like Ginestra, Ripacandida e Ruvo del Monte. Although in the last years the employment increased thanks also to a Fiat factory (Italian automobile industry) based in San Nicola of Melfi and all the activities that starter thanks to this productive activities like all the food industry based in the area since 1990, the employment rate is rather low compared to Province average and the unemployment rate is rather high. Unemployment concerns both young people than older workers expelled from the labour market, which then suffer from difficulties in reinsertion into the labour market.

For what concerns the level of education in this area it is lower than the regional average. The gap even increases with increase of the level of education: from the secondary school to the University degree. In addition, a high rate of analphabetic reached 6,8% of the total inhabitants and the persons without a level of education is 20,5% compared to average regional of 18,6%.

From this scenario it can be concluded that the workforce is relatively weak and fragile compared to other area of Italy that can be insert into the labour market which need new professional qualification especially entrepreneur that can revitalise the area with resources of the area.

Indeed, the automobile industry Fiat and all the other activities are now almost full. In addition, the population is not very used to settle new entrepreneurship, which don't help the come up, and the increase of the small and medium enterprises. The risk to let the old skills and abilities related to the traditional professions die and/or not give them the right social recognition that they deserve.

The good policy practice “Hand project – traditional professions for new employability” has the aim to raise employability both of the young and the older workforce expelled from the labour market picking up and recognising the traditional professions.

From the statistical data Excelsior and from other research about the needs realise by the Chamber of Commerce of Potenza about the training needs and the professional qualifications required from the economic system, it came out that it is difficult to find in the area professional workforce especially for very specific professions which require after one is hired a specific additional vocational training.

It is the case for the traditional professions like the “casaro” (cheese and milk producer), which are seen by the young people as not qualified occupations.

The good policy practice has the aim to redevelop and to give a new social recognition to the “ancient-traditional professions” related to the culture and identity of the context but at same time these old professions has to be competitive, economically useful in the socio-economic context using the local resources in order to create new employment opportunities for the young generations.

The good policy practice creates a partnership between the old workers, which knows these ancient – traditional professions that will teach to the young workers these old professions, and the already existing enterprises in the area where the stage and the training took place.

The young workforce who will benefit from the project will be able to integrate him/herself in the entrepreneur activities existing in the area and renovate them. In addition, once they have learned the profession they will be able to create their own enterprises or own business I different sectors in order to supply the local demand.

The professional profile that comes out is that of a person with high qualified profile not only able to have acquired this ancient manual know how – handicrafts, services, artistic manufacturing - but also able to plan and implement new productive process.

In addition to show the goods created, they have created a touristy attraction.

The policy practice is divided up into different phases.

The *first phase*, concerns the territorial analysis. In this phase started a reconstruction of the economic productive system based both on the an analysis of the literature and documents that were available than on the empirical research that had the aim to discover the traditional

ancient professionals that had an enterprise just ready to close or to leave to a new professional

The *second phase*, concerned the analysis of the professional skills and ability of these traditional – ancient professions. In this phase there was an analysis of these traditional ancient professions with the related skills and professional competences needed thank to qualitative research based on structured interview to significant sample. Then, it has been made a comparison between the professional skills, abilities, competencies, know-how hold by the older workers and those of the younger workers or unemployed who participated in the project. From this mismatch of skills and competencies, it was possible to decide what vocational training to realise in order to be able to transmit the professional knowledge to one generation to the other.

The *third phase*, concerns the guidance and training from the old generation to the young generation. In this phase were realised and implemented the guidance and training activities identified in the previous phase. The participants have been selected according to their motivation to learn a traditional – ancient profession.

A *bilan de compétence* has been realised for each participant, identifying the special needs.

The *fourth phase*, concerned the placement of the young participants and assistance for creation of new enterprise. The aim of this phase was to support the entrance in the enterprise of the young participants or the support to build their own enterprise.

For this purpose it has been used the traditional book of al the participant student in the guidance and training courses to the local entrepreneurs.

For what concerns the assistance for the creation of its own business the young entrepreneurs were supported in the planning of their activity, to overcome the administrative-bureaucratic barriers, to identify financial resource, the passage from the closing of one activity to the opening of a new one thanks to a mentoring activity.

Type of initiator

The type of initiator consisted in different social and economic actors such as:

- Local System Engineering;
- La Geda Consultino;
- Consorzio Valorizzazione Turismo (Co.Val.Tur);
- Chamber of Commerce, Industry, Artisan, Agriculture of Potenza (CCIAA);
- Pro Loco of Pescopagano;
- The Professional Association of Italian Sociology from the Basilicata Region.

Target groups

The target groups are twofold.

The first target group of this good policy practice have been 30 employed young people in precarious jobs and/or unemployed, which lived in the defined area of policy intervention.

The second target group are older workers with a traditional – ancient profession near to be become pensioners or near to close their activity who are willing receive a social recognition and than to become the teachers for the young workers.

Tools

The project has planned and realised a phase of promotion and a final phase of dissemination of the results.

For what concerns the initial promotion of the project, the promoter have realised a logo of the project, made a brochure, leaflets, publications that were handed out to entrepreneur and training centres. In addition, they created an institutional website. Finally, they have started a campaign of awaken the public opinion the local area organising a starting with a traditional convention and with many articles written and printed in the local newspaper and radio.

At the end of the project they started to disseminate the results to the actors that in the future could implement again this policy practice such as:

- secondary school;
- vocational training centres;
- local authorities;
- trade union;
- cultural associations.

The tools used for the dissemination of the results were the more traditional public meetings and conferences, paper publications and websites but also the more innovative exhibition of the traditional-ancient professions.

Duration of the action

The duration of this policy practice have been two years from end of 2005 to mid 2007.

Feedback

The policy practice has been very innovative and gave a new impulse to the economy in the area and to the future employment.

It gave the possibility to think a new model of socio-economic development based the local resource of the area. In addition, it gave a strong social recognition to these traditional ancient professions that risked disappearing but also it gave a new.

It is still to soon to know if there will be a creation of new enterprises.

Motivation for selection

The motivations of selection are several.

First of all, the importance of this policy is to be very innovative and to have at its core an intergenerational dimension: who benefits from this policy practice are both the young workers or young unemployed than older workers near to the pension.

From the results of the previous research it came out on one side that younger workers have difficulty finding someone that supports their working career. On the other side, older workers some times feel to be recognised from the younger generation for their professional competencies but are also often frustrated not to transmit their knowledge to younger generation. They fear often that their knowledge is “obsolete”, not useful compared to the technological skills of the younger generation. This policy is a good example of how important is this transmission from one generation to the other thanks to a mentoring and what a benefit for the whole community.

This model can be transferred in other socio-economic context.

5.4.3 Project AUDAX (Portugal)

Practice developed at company level

General presentation

Although SME's face some difficulties, they are important vehicles in the development of the market and in the creation of new jobs in Portugal. A significant percentage of SME's are familiar companies. Many of these SME's have a simple organisational structure according to Mintzberg typology (Mintzberg, 1983), and their management is based on the image of the “Owner” of the company. HRM is based on proximal familiar relations and the succession is based on the power transfer to young members of the Clan (family), many times the Owner's descendants. The succession process has introduced in some of these companies an intergenerational conflict between the accumulated experience of the older Owner and the need for modernisation and entrepreneurship of the younger generations.

According to the results of the 2006 survey produced by the Observatory of Companies' Creation, a IAPMEI report published in May 2007, youth is one of the main characteristics of the Portuguese entrepreneurs – more than half (52,5%) are aged 35 or less, and more than ¾ (78,3%) have no more than 45 years old. Although the results indicate a majority of young people involved in entrepreneurial initiatives, there is also a small amount of entrepreneurs among older age groups – 1,6% of the entrepreneurs have more than 65 years old. It is interesting to note that, 28% of these older entrepreneurs, had their first experience as businessmen recently, 64,3% were already in the retirement period and 21,4% were still working on their own account or in other enterprises. It is interesting to remark that another relevant characteristic of the Portuguese entrepreneur is being a man (65,6%) against a growing minority of 34,4% of women. In younger generations aged 26-35, the proportion changes to 60,6% of men and 39,4% of women.

Another important remark concerns the link between the universities and the labour market. Universities are often criticised for being apart from the “real world” of the companies, namely in the management area. Theoretical developments and valid scientific knowledge's emerging in the academy are not always transferred to the entrepreneurial community. This fact was another important factor for the development of the selected case.

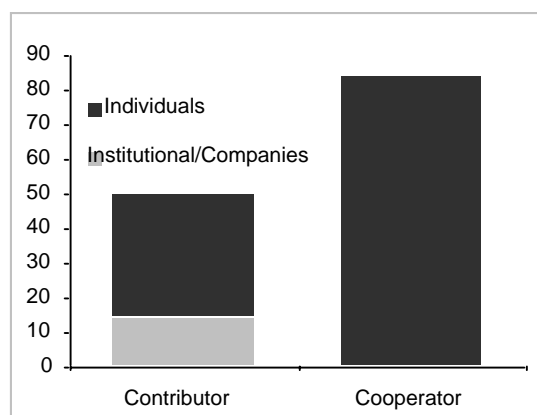
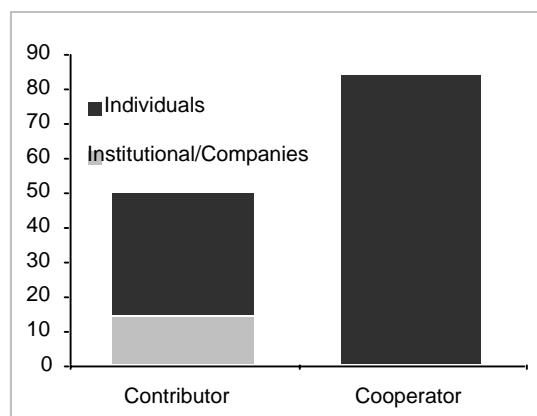
AUDAX, a research and support centre for entrepreneurship and familiar enterprises, was created in July 2005 as a non-profit association whose objective was to study, support and promote the entrepreneur spirit, the systematic innovation and the sustainable self-employment. It also seeks to intervene close to the potential entrepreneurs and managers of

familiar companies that show innovative potential and that invest in activities of advanced technology and strong growth.

The idea is to develop a large spectrum of research activities and to render services to the scientific, academic and entrepreneurial communities, sustained by an integrated research project giving dedicated support to entrepreneurship and to the reality of familiar companies. It is a mobilising project which emphasis pedagogical activity and the simple linking of entrepreneur activity and the creation of new businesses.

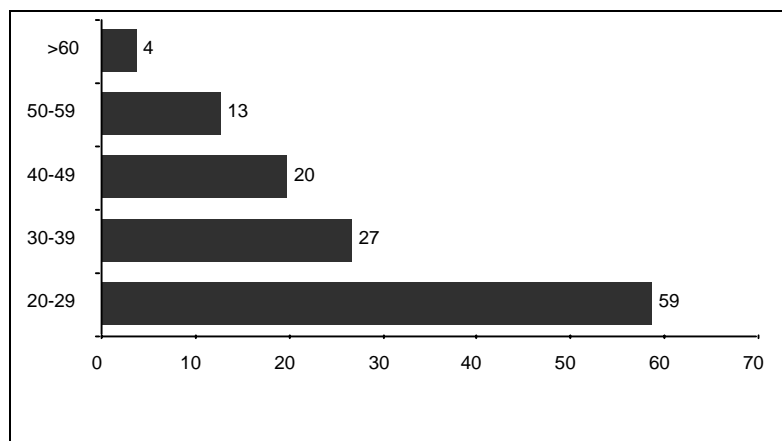
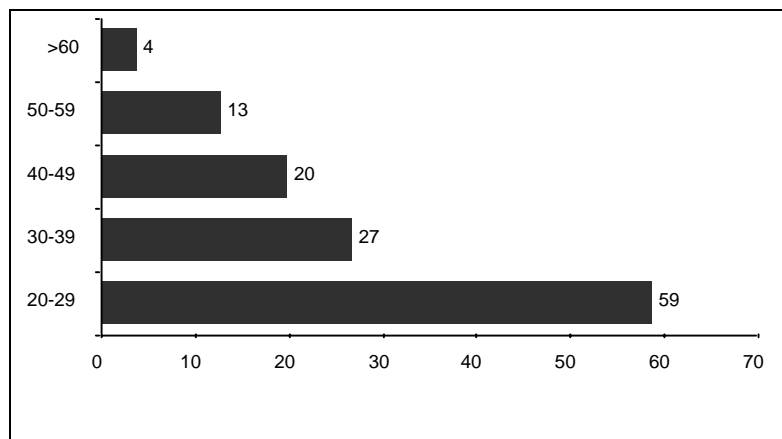
AUDAX started with a modest number of associates and has now 139, namely institutional founding associates such as INDEG Business School (Instituto para o Desenvolvimento da Gestão Empresarial do ISCTE) and ICAT - ICAT/FCUL – Institute of Applied Science and Technology of the Faculty of Sciences of the University of Lisbon (Instituto de Ciência Aplicada e Tecnologia da Faculdade de Ciências da Universidade de Lisboa) and institutional promoters like ISCTE Business School and the Faculty of Sciences of the Lisbon University.

Figures 1 – Proportion of AUDAX’s associates by category,
Source: AUDAX



In terms of individual associates the number has also increased since its start-up. Their current associate's age distribution is shown in the next figure.

**Figures 2 – AUDAX's associates by age group,
Source: AUDAX**



AUDAX main goals are: a) to develop and support applied research projects about entrepreneurship and management of familiar enterprises; b) to develop specialised training programmes about entrepreneurship, companies set-up and management of familiar companies; c) to organise events about entrepreneurship and management of familiar companies, as well as to promote publications concerning those areas of knowledge; d) to promote the constitution of vehicles of investment to support the beginning of business projects with academic origin and/or related with the restructuring of familiar companies; e) to provide specialised services of consultancy in the domain of business management, financial management, marketing and innovation, as well as services of general support to business projects setup on the academy.

Type of initiator

The initiator of this project is a non-profit association of academics with strong connection with the entrepreneurial sphere, many of them integrated in important companies.

Target groups

The target group comprises entrepreneurs of any age and individuals involved familiar businesses.

Tools

AUDAX uses 8 main tools in order to attain the goals described above. They are: 1) investment vehicles; 2) special projects; 3) research; 4) publications; 5) organisation of events; 6) training courses; 7) specialised consultancy services; and 8) protocols of institutional cooperation.

Investment vehicles

FIQ Universitas Start-up's - a risk capital fund directed for the investment in emerging small and medium size businesses with a budget of 3 million Euros, divided between universities (ISCTE, FCUL, UBI, U. Évora, U. Algarve, U. Oporto, U. Aveiro, Technical Institute of Oporto and Technical Institute of Leiria), financial institutions (CGD, Portuguese Bank of Management) and the Fund of Unionism (FSCR PME/ IAPMEI).

Special projects

There are two main special projects: a) AUDAX Businesses put to the proof, a television contest for entrepreneurs - aiming to develop the spirit of initiative in any activity (entrepreneurial, associative or cooperative) on a national scale. The project was developed with the cooperation of the National Radio Television (RTP) and will be broadcasted on Channel 2 beginning on February 2008; b) a centre for arbitration and mediation (with a national scope) – aiming to promote the peaceful resolution, through arbitration, of all kind of litigations directly, or indirectly, related with social and familiar companies' conflicts.

Research

Promoting applied research in the domains of entrepreneurship and management of familiar companies is the objective of the research area. NEO – National Entrepreneurship Observatory, is the most prominent project of AUDAX in this scope. The mission of NEO is to collect, produce and diffuse scientific studies that contribute to a better understanding of these phenomenon in Portugal facilitating the formulation and implementation of policies that effectively support national entrepreneurship. The main vectors of research are: entrepreneurship, intra-entrepreneurship and social context. Some relevant studies already developed are: a) the study of the profile of the Portuguese entrepreneur - being age an important comparative variable; b) the trust rate on SME's; and c) the study about the national familiar companies – the dynamics of evolution.

Publications

The publication of manuals is another important activity. In this light, there are several publications in preparation: a) Manual of the Entrepreneur; b) ABC of the Entrepreneur; c) Manual for the Management of Familiar Companies; and d) Collection of studies and statistics for the observatory activity. It is also previewed the publication of a newsletter on a quarterly basis to be distributed to all associates.

Organisation of events

The organisation of events is another important tool. To be pointed out here the organisation of: 1) the annual closing conference of the post-graduate course on Entrepreneurship and Company Creation; 2) the closing seminar integrated in the course of Advanced Studies on Familiar Companies' Management; and 3) the annual meeting of all the community of students, old students and lecturers of the post-graduation on Entrepreneurship and Company

Creation and AUDAX associates. It is also planned a programme of debates among AUDAX associates.

Training

It is focused on the coordination of the post-graduate course on Entrepreneurship and Company Creation of INDEG/ISCTE, and on the course of Advanced Studies on Familiar Companies' Management. It is also planned the development of specialised courses directed to specific publics. It is important to note that the majority of attendants of these courses are the young generations.

Specialised Consultancy Services

Taking advantage of the associates' contact network, their know-how and experience, AUDAX provides specialised consultancy services in four distinct vectors: 1) Elaboration of business plans for the start-up's and expansion projects of familiar companies; 2) Engage investors and business partners; 3) Negotiation with funding sources; and 4) Consultancy in the domains of Strategy, Technology, General Management, Marketing and Management Controlling.

Protocols of Institutional Cooperation

AUDAX has signed protocols with other institutions, private and public, whose activity is somehow connected to the potentialities of the Centre. Some examples of protocols: KPMG, CGD, OPEX, APCRI, IAPMEI – Programme Finicia, INOV Capital, Municipalities (Lourinhã, Paredes and Caldas da Rainha), FORESTIS /AMMesquita /AdP, SME Investments, Group LENA and APBA – Portuguese Association Business Angels.

Duration of the action

This project is a permanent action.

Possible feedback

AUDAX has contributed to the set-up of a number of new companies, arising from the post-graduate courses. The majority of the students admitted to the courses were aged < 30 (56% of a total of 103 students). The age group situated between 30 and 40 years old gathered 29% of the candidates. And 15% of the attendants had more than 40 years (Esperança, Ferreira, Caetano and Santos, 2007).

Concerning the most salient output of project AUDAX - the national television contest for entrepreneurs launched during 2007, AUDAX Businesses put to the proof, the table bellow summarises some interesting figures.

**Characteristics of applications and applicants to the contest,
Sources: AUDAX**

| | |
|-------------------------------|------------|
| Number of applications | 260 |
| Valid | 184 |
| Incomplete | 63 |
| Invalid | 13 |
| Sex | |
| Male | 64,0% |
| Female | 36,0% |
| Age groups | |
| 18-25 | 32,3% |
| 26-30 | 21,0% |
| 31-35 | 17,7% |
| 36-40 | 11,8% |
| 41-45 | 8,1% |
| 46-50 | 4,3% |
| 51-55 | 2,7% |
| 56-60 | 0,5% |
| >61 | 1,6% |

As shown, the majority of applicants to the television contest were male aged 18-25.

From the total of 184 valid applications, 50 were pre-selected and in the end only 30 (+3) will be selected to participate in the contest. Another relevant analysis regards the means of communication with the media and other institutions, such as other universities, used to promote the television contest.

**Summary of the means of communication,
Sources: AUDAX**

| | |
|----------------------------------|--|
| Press conferences | 3 |
| Roadshows throughout the country | 11 |
| Advertising spot on television | With different testimonies |
| Press | Special cover in 2 newspapers and institutional advertisements |
| Boards and flyers | On the universities, PT stores, CGD counters, IAPMEI centres and a special flyer on Taguspark (an important business centre close to Lisbon) |
| Internet | www.audax.tv, covered on www.sapo.pt and businesses channel |

Sources

The main source for the elaboration of this case was www.audax.iscte.pt and AUDAX's team, namely the general director.

Other relevant remarks

The definition of the “entrepreneur characteristics” may constitute a key-element, not only in the identification of potential entrepreneurs, but also on the support to individuals that wish to change their career on a latter stage of their professional life.

To be an entrepreneur, independently of the age, reflects a different pattern of relation to work. A pattern where the agent is active and where the work path is seen as active choice.

According to Santos, Currel and Caetano (2007), economical motivation, initiative, ambition, passion for work, wishing to go further and establishing “my own business” are the most relevant categories that characterise the entrepreneurs profile. Other relevant cognitive characteristics are the capacity for autonomous decision making, the willingness to take risks and the ability to solve problems.

On the other hand, if this initiative may represent an opportunity to demonstrate the relevance of updating the younger generations, it may also represent an excellence vehicle for the attraction of more potential entrepreneurs from all ages.

5.4.4 The mentoring scheme of young people towards employment (France)

Public policy developed at national, local and company level

General presentation

The mentoring scheme (parrainage) of young people towards employment consists in a personalised help and guidance of young people given by voluntary and unpaid « mentors » (parrains) who are still working or who are retired.

The explanations that underlie the creation of this scheme are the following: the young people's difficulties in the labour markets can be explained by their low skills levels, their social background, the negative picture of their area, the discrimination based on their origin, the lack of social capital and networks that could facilitate entry into firms.

Consequently, the mentoring scheme aims at tackling these difficulties and at helping young people in finding a good job or a training scheme, and staying in the firms, thanks to mentors who can share their work experiences and networks. The mentors make a commitment to follow and meet regularly young people in their transition to actual employment. Indeed, they offer to mediate between young jobseeker and the occupational world that young people do not know. The mentoring scheme is not a subsidised employment program in the private sector, but a support in finding a job that is joined with other schemes.

The first experiences dated back to 1993 and were set up on an experimental basis in five regions by the network of local agencies for young people (missions locales) and the advisory, information and guidance centres (Permanences d'accueil information orientation, PAIO). A decree published in 1997 planned a development of the mentoring scheme (circulaire DPM 94-25 de juillet 1994). It covered the whole national territory in 1999. The expansion

has been fast: 1000 young people were helped by 770 mentors in 1993/1994; 13 000 young people are helped by 6000 mentors in 1997. The scheme developed further with the « Road to employment » programme (Trajectoires d'accès à l'emploi, TRACE), created in 1998, and implemented by the local agencies (Missions locales and Permanences d'accueil information orientation, PAIO). This program provided an individualised support scheme over an 18-months period to help young people who left school without skills and qualifications, especially those who come from disadvantaged areas. In 1999, a national charter of mentoring is signed by the Ministry of employment and solidarity, and ten representatives of the economic and social world as well as associations. In 2001, a decree from the DGEFP (General Direction of Employment and Vocational Training) asserted the political will of developing mentoring, which is extended to adults, even if young people benefit predominantly from the scheme.

After the 2002 elections, the scheme is still important in the interdepartmental programme for inclusion and fight against discriminations, which is coordinated and followed by the DPM (Direction Population Migration). More recently, a decree of DGEFP plans to organise « the mobilisation of the social and economic world in order to develop and diversify the networks of mentoring scheme towards employment ». It asserts the role of mentoring scheme in the Social Cohesion Plan of the Government.

After first experimentation in the associations, the mentoring scheme has thus succeeded in becoming an important solution in the arsenal of public measures for youth integration. It institutes an original intergenerational relationship: by building up a relationship based on trust, the mentor can afford both a moral support and more technical advices in job seeking, or even contacts and credibility in the occupational world.

Type of initiator

The mentoring scheme was initially implemented by the network of local agencies (missions locales, henceforward ML) and the advisory, information and guidance centres (permanences d'accueil information orientation, henceforward PAIO). Today, if the mentoring scheme has been expanding, it is still coordinated by the local agencies, in majority. Introduced in 1982 after the publication of the Schwartz report, the ML and PAIO are public structure (GIP – groupement d'intérêt public) or association (association Loi 1901), financed by the State and local authorities. They are set up on the local actors' initiative. That's why they can be established at the level of a municipality, a group of municipalities or a district.

The ML/PAIO network should help young people in the social and occupational integration transition, by a global approach of their difficulties, in terms of training and skills, social behaviours, or access to social rights (health, housing, etc.). The network consists of 550 agencies (in 2002, 400 ML and 150 PAIO). It gets in touch with 900 000 persons, among which 60% are young people who left the school before 26 years old. The network is targeted to young people with few or without qualifications: it orients them to employment, training or the National Employment Agency (Agence Nationale pour l'Emploi, ANPE). It is for example responsible of half of the entry into training.

The mentoring scheme is set up at the regional level. The calls, the selection of projects, and their monitoring are undertaken by a regional steering committee chaired by the prefect of region, and sometimes co-chaired by the president of the regional council. Representatives of diverse public services participate in this steering committee : the regional direction of social

and health action (Directeur régional de l'action sanitaire et social, DRASS), the regional representative in charge of urban development in the department of regional affairs (secrétariat général pour les affaires régionales, SGAR), the regional director of agency for sustaining inclusion and fighting against discrimination (Fonds d'action et de soutien pour l'intégration et la lutte contre les discriminations, FASILD), the regional director of the National Employment Agency (Agence nationale pour l'emploi) and the financiers of the schemes. At the national level, a steering committee depending on the “Direction Population Migration” is in charge of the monitoring.

The scheme relies on public financing from the State, local authorities and the FASILD, and private financing can sometimes be mobilised.

Target groups

The mentoring scheme concerns mainly young people aged below 25 years old and with a low skills level, facing discriminations or difficulties in entering into the working life. According to the choice of the ML, the scheme can be targeted to young people without or with few qualifications, or extended to all young people facing difficulties in professional integration.

Motivation

The role of social contacts and networks in the labour market is well-known. But many young people do not have a social network that could help to find a job. Indeed, their family and friend circles are also touched by unemployment or work in the black market. The mentoring scheme towards employment allows establishing personal relationships between young people facing difficulties and older people who can share their positive experience of the working life. The scheme is both a tool to tackle youth unemployment and a way of developing intergenerational solidarity. This scheme is furthermore interesting because it has been tested by local actors during 15 years now and had gained a sufficient institutional legitimacy that allows overcoming changeover of political powers between parties.

Tools

The regional steering committees are in charge of the call writing, the selection of projects, and the monitoring of financed projects. At the local level, agencies use different tools in order to mobilise unpaid mentors: e-mails, forum, conferences, workshop, and partnership with firms if they want working mentors or with pension funds if they want retired mentors, etc. The local agencies (ML) choose the young people that can be mentored, organise the first meeting between the mentored young and the mentor, and lead the mentoring network (monitoring of actions, exchange meeting between mentors). The organisation of mentoring scheme can be more formalised with, for example, some precise services (help in writing a CV, job interview simulation) or the monitoring of files (written reports of meeting, regular evaluation, etc.).

Duration of the action

The first experimentation dated back to 1993, but the project was extended at the national level in 1999. Since this date, the regionalised scheme has been regularly renewed by decrees of the Direction of Employment and Vocational Training (DGEFP).

Possible feedback

The mentoring scheme is evaluated at different level: activities' reports of the ML, evaluation by the regional steering committee, evaluation by the national department (DGEFP).

In the official documents, the mentoring scheme is said to « have proved its worth ». At the national level, a report of the mentoring activities in 2003 is in the annex of the decree of the DGEFP n° 2005-20. They are 449 networks and 8 227 mentors, that is to say 10 new networks compared to the year 2002. It concerns 12 504 young people. At the regional level, there are more qualitative evaluations. For example, an evaluation of the mentoring scheme in the Alsace region show that it does not increase much the re-employment probability, but it has an effect on the job quality: it increased the probability of leaving precariousness, of breaking the vicious circle of dead-end jobs and of obtaining a durable job. More generally, the evaluation of mentoring scheme needs to take into account the diversity of its implementation, according to the targeted group (young people near the labour market, young people with hard difficulties), to the status of the mentors (who can be active or retired) or to the content of the mentoring (technical help, moral support, mediation between the employer and the young), etc.

Sources

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5.5 Relations at work

5.5.1 Accor Hotel Company – Intergenerational diversity: we can really do it better together (Belgium)

Private initiative developed at company level

General presentation

Accor is a worldwide company operating in nearly 100 countries. The selected practice is an initiative of the Benelux HR Department manager. Accor Hotel Company employs mainly low qualified workers in quite large structures. Moreover, the distribution of age groups is polarised between very young workers and forty / fifty years old workers who do not share common values and experiences regarding work and employment. Such statements observations have decided the HR Manager to set up an information and training programme concerning intergenerational diversity.

This project was developed in three steps.

- In February 2006, the company organised for its employees a national awareness building forum about the challenges that the company has to face in a changing world. Age diversity and intergenerational management was one of the main topics approached during this meeting.
- In a second step, Accor published a small book for the managers and middle managers of the group. This book (Intergenerational diversity: we can really do it better together) proposes a basic analysis of generational characteristics and provides some practical keys for a comprehensive intergenerational management. It is also a practical guide for the managers to support new managerial practices in this field.
- At least, a training programme (two days for each session) was organised. It aims at linking the diversity of attitudes regarding work belongings to different generations of workers to the corporate culture as defined by the Accor Company. 350 managers and middle managers took part to this training, featured as “entertaining but fruitful and useful”.

Type of initiator

Accor Hotel Company Belgium is a private company. It belongs to the international Accor Group, European leader in the hotel trade and tourism sector (representing more than 4000 hotels in 90 countries: Sofitel, Pullman, Novotel, Mercure, Suitehotel, All Seasons, Ibis, Etap Hotel, Formule 1 et Motel 6) and world leader in the service sector (restaurant tickets and cards restaurant, people services and assistance, motivation...). The Accor Group is located in nearly 100 countries and employs 170.000 collaborators. The selected practice was launched at the initiative of the Belgian HR Department manager.

Target groups

The initiative is dedicated to managers and middle managers of the Accor Company. In the HR strategy, they are considered as the ideal position to relay and manage, on the first hand, the company’s commercial and age policy and, on the other hand, the local contingencies and issues.

Tools

The project mobilises a diversity of tools:

- HR Department organised a large meeting dedicated to a general discussion that allowed to link intergenerational issues to a wider perspective about social changes.
- A publication focused on practical solutions about intergenerational management was published and sent to all managers and middle managers.
- Regular trainings aim to integrate intergenerational perspective to the organisational socialisation.

The publication is a small book, round 60 pages including many illustrations and quotations. It is designed as an “interactive” and “funny” document that proposes: tests to assess the understanding of generations of the reader; analysis of concrete situations; concrete guidelines for potential actions for managers. It is divided into four parts: the presentation of the different generations; generations at work; concrete guidelines for actions for the managers; the client perspective.

The book distinguishes four generations: the CoCos (collectif concret / concrete collective), born between 1920-40; the BoBos (bourgeois bohème / bourgeois bohemian), born between 1941-67; the MoMos (mobile moral / moral mobile), born between 1968-76; the YoYos, (you, yobbo / kind of lout), born after 1976. The book describes: who they are? What are their key characteristics? What are their behaviours at work and their expectations regarding work? Besides this quite funny or provocative names given to the generations, the book gives a comprehensive approach of what can be different and perhaps questioning in the intergenerational relations in daily work.

Duration of the action

The project started in 2006 and still continues today. The Company regards intergenerational management as a continuous and important challenge.

Possible feedback

All (middle) managers have been involved in the awareness raising programme. Since 2006, 350 of them took part to the training program and all of them received the small book. Moreover, intergenerational issues will be integrated in the satisfaction inquiries (realised every 18 months).

Contact

Accor Hospitality, Head office HR Belgium and Luxembourg, Katia Sokolsky, 32 (0)2 4816959 www.accorhotels.com

6. Second cluster: ageing management in an intergenerational perspective

Nowadays, facing the demographic changes, globalisation and the overall economical situation of the European countries, political and managerial actors agree on the fact that future economic growth, competitiveness and efficiency will increasingly depend on how employers will manage their ageing workforce. In this perspective, “the widespread adoption of good practices in age management will help organisations to: adjust to the inevitable ageing of their work forces; enhance the competitiveness and productivity of their ageing work forces; improve the employability of ageing women and men; assist in prolonging working life; ensure more equal opportunities between workers of different ages. There is, then, a powerful economic imperative for age management in employment. It will no longer be possible for employers to bank on a sufficient supply of young workers: increasingly, they will have to confront the ageing of their existing work forces⁷”.

In the view of these statements, and always keeping into consideration an overall demographic datum, following which Europe is an ageing continent, it seems to be more and more necessary to target specific policies on the older workers. They represent more and more a huge part of the workforce, and their correct management can not avoid to take into consideration the aspect of the relation with the younger generation in a view of integration.

As already remarked above, there are not so many practices implemented at national, local and company level regarding both the younger and the old generations. In this second cluster, we gather those practices, which are mostly targeted to the older workers, but always in the view of the intergenerational collaboration. The purpose is to propose tools and suggestions for a correct age management at different levels, from which to learn how to deal with the increasing ageing of the workforce, taking advantage from it, in the view of an integrated and cohesive working society.

An interesting aspect is that some of the practices filed here regard not the workers close to the retirement age, but also middle-aged ones (45+). They are not ready to leave the labour market, but still they can experience the exit from it, and a certain risk of not being reintegrated. It is not a random case, in fact, the increasing the presence on the labour market of workers aged 45+ is one of the Lisbon strategy.

6.1 Fund for professional experience (Belgium)

Public initiative at a national level

General presentation

The Fund for professional experience is a national fund. It is one of the policy instruments of the governmental programme on ageing.

According to the European employment strategy of Lisbon, one of the targeted objectives is to raise the employment rate of aged workers (45+) up to 50% in 2010. In that perspective,

7. Naegele G., Walker A., A guide to good practice in age management, EIRO, 2006.

the Fund for professional experience aims at improving working conditions of ageing workers. It encourages initiatives that: give the opportunity to the 45+ to acquire new experiences or to enhance the value of their professional experience; ease the transfer of experience between generations at work; make the workplace more attractive for older workers; encourage companies to be aware to the elder's working conditions; etc.

The Fund gives financial support (subventions) to concrete projects, for a maximal duration of 24 months. More precisely, the role of the Fund for professional experience is: to give advises about the setting up of the projects; to provide information about subventions; to collect solicitations from companies and to transfer it with their opinion to the ministry of work; to announce the official decision to the company; to pay the subvention.

Projects at the company level must be presented by the enterprises, with the agreement of the workers' council or (if no workers' council) the trade union delegation, and in any case with a positive advice from the health and safety service of the company. Concerned workers must be associated to the project planning. Projects at the sectoral level must be presented by joint sectoral funds (managed by business federations and trade unions) or by sectoral training centres.

Projects can be targeted to either the improvement of material working conditions of 45+ workers (ergonomic adaptation of the workplace, lightening of workload...) or a new design task allowing to relieve them of a part of the psychological charge (lightening) or to propose changes in job content (f.e. from heavy to administrative jobs). Subventions can be granted to awareness campaigns, diagnostic tools or training tools.

- The Fund for professional experience is explicitly dedicated to the 45+ workers. However, we selected it as a good policy practice for the SPReW project because some (the shorter part) of the supported projects propose to act on the intergenerational level to improve the working conditions of the older workers. Some of them suggest, for example: to organise the transfer of tasks and of knowledge to their younger colleagues; to assign them to a function of team coach or of trainer; etc. Those projects tend to build a link between generations even if they very often have a limited scale (most of the projects concern one or two people).

Type of initiator (policy maker)

The Fund for professional experience depends on the Federal ministry for employment, labour and social dialogue (SPF Employment), under the directorate "Humanisation of work". The Fund is currently managed by a team of seven persons, including four project developers (two NL and two FR), two grant managers and an administrative support.

Target groups

Ageing workers (45+) are the target group of the projects supported by the Fund. Enterprises and, since more recently, sectoral funds or sectoral training centres are the recipients of the grants. Several conditions are imposed to candidate enterprises:

- They have to follow a 3-steps project design, including the measurement of the work ability of workers, the diagnostics of their working environment and the description of the projected improvements (cf. "tools" below).
- The grant cannot be added to other similar grants for the same project.

- The workers' council or the health & safety committee or the trade union representation must be consulted and give an advice.
- A positive advice must be formulated by the internal or external service for prevention, health and safety at work.
- The employer is committed to maintain the concerned worker at work during the whole duration of the project, with a minimum of 12 months.

Tools

The Fund has developed several tools to help the candidates to prepare and develop their projects.

- Tools for the measurement of work ability: the Fund proposes a set of questionnaires, to be used by the prevention advisor or the company doctor, in order to check the work ability of the potentially concerned workers. The candidate may either use the questionnaires developed by the Fund, or other similar existing tools developed by consultants (for example the Work Ability Index, the Work Monitor, etc.).
- Tools for diagnostics: the Fund proposes a checklist, to be used by the prevention advisor or the company doctor, in order to assess the working environment of the concerned workers. Here too, the candidate may either use their own tools, or the tools developed by the SPF Employment: notably a participative methodology for risk assessment in working situations, named DEPARIS, and a SFP reference framework for ergonomic and psychosocial analysis.
- Tools for project design: The Fund proposes to classify the projects into three categories: project aiming at the promotion of employment of ageing workers; projects related to the improvement of the ergonomic or psychosocial workload; projects developing work organisation patterns favourable to ageing workers.

Duration of the action

The Fund is a long-term institutional creation; its location at the SPF Employment guarantees institutional stability.

The maximum duration of each supported projects is 24 months, but among the currently accepted or running project there is a wide range of scope and duration: some projects only address one or two workers for a duration of a few months (mainly for targeted ergonomic improvements), while other project address larger groups of workers for more in-depth changes in working conditions or work organisation.

Feedback

The starting phase of was rather long, between the political decision in 2001 and the beginning of operations in 2004. During the first years, some adjustments were made to extend the concerned target groups. Firstly, the fund initially financed projects for workers aged of 55+ but it was considered as too close to retirement to support real age management initiatives. The decisions to extend to 45+ workers allowed then to select more projects and to encourage a preventive management of the ageing workforce. Secondly, a recent modification of the legal provisions (2006) was introduced, in order to include initiatives not only at the enterprise level, but also at the sectoral level.

Moreover, even if the intergenerational issues are considered by the Fund's manager team as a fruitful standpoint to address ageing issue in companies, their scope of action is restricted to the projects introduced by companies and sectors and, most of those projects are concentrated on the aged workers situation in company or on the ergonomic improvement of their work place. No awareness or information campaigns were led to encourage intergenerational solutions.

Contact

Web sites of the Fund:

www.fondsdelexperienceprofessionnelle.be (in French)

www.ervaringsfonds.be (in Dutch)

6.2 Vuurtoren45+ (Belgium)

Public initiative at the regional or local level

General presentation

Vuurtoren45+ is a network of enterprises and public organisations, aiming at gathering and sharing positive experiences in the implementation of retention policies for ageing workers. Most of the partners are located in the province of West Flanders, but some key partners cover a wider area, notably the temporary work agency Randstad and the University of Leuven (KUL). The project is financially supported by the Flemish agency of the European social fund (ESF), for a 2-years period (May 2005 to April 2007). The name of the project (Vuurtoren means lighthouse in Dutch) suggests that its initiators would like to build a reference mark.

The main realisations of the project are to design and implement training packages for employers and employees, at the enterprise level, and to organise both a virtual network (online forum) and a physical network (periodic meetings) of concerned workers and stakeholders. Not all realisations at the company level have an intergenerational dimension, although it was one of the initial components of the project. In May 2007, 30 organisations are members of the project network, among which 4 public or non-profit organisations, 2 hospitals, 5 enterprises from the building industry, 9 from manufacturing industries, 4 from business services, 4 from sheltered workshops and some others.

The policy background of the project refers to both the action lines of the European social fund on ageing at work, and the national "Pact between generations" (2005), which aims at increasing the low employment rate among older workers and retaining 50+ workers longer at work. More particularly, this sub-region of Flanders is characterised by a rather low unemployment rate and a rather ageing working population. Enterprises may need to avoid early retirement or de-motivation of older workers, in order to prevent shortages in some occupations.

Type of initiator (policy maker)

The project coordinator is the Chamber of Commerce of West Flanders (Bruges and the coastal region), as a local member of VOKA (association of the Flemish employers' organisation and Flemish chambers of commerce). The project is initiated from the employers' side, but it is also supported by provincial public authorities. Two research centres

of the University of Leuven are associated to the project: one for policy analysis and one for development of training packages.

ESF funding requires this kind of partnerships between business organisations, public authorities and academic institutions.

Target groups

The main target group is composed of human resources managers and (if different) training managers in companies that are confronted with issues related to ageing at work. The purpose is to provide them with guidelines and tools for “ageing-friendly personnel management”.

If the first goal of the action concerns retention policies for ageing workers, the intergenerational dimension has been included in a significant number of projects. Among the 30 partner companies or organisations, about one third have include this intergenerational dimension.

The intergenerational approach can take various forms, which however pursue the same objectives under different names:

- Coaching or tutorship: ageing workers are entrusted with a new mission towards younger workers or new entrants. Tutorship is mainly developed in companies where the skills have to be acquired on-the-job.
- Sponsorship: work organisation fosters mix-aged teams, in which each young worker has a “godfather” among the older workers.
- Knowledge transfer: younger and older workers take part together in training activities or knowledge sharing workshops, fostering reciprocal knowledge transfer: “fresh” knowledge brought by the recent education background of the younger and experience gained by the older.

Tools

Two kinds of tools are developed in this project:

- Training: training packages for companies and organisations, which are designed independently from the sectors; training addresses human resources managers on the one hand, ageing workers on the other hand. Training packages are developed by the partner KUL.
- Networking: online forum, database and services accessible for project partners to a restricted area of www.vuurtoren45plus.be; series of meetings and thematic workshops, organised about every three months, and presenting good practices, frequently asked questions, problems and solutions. Online tools and communication events are managed by a specialised partner (INDIA).

Duration of the action

Vuurtoren45+ is an ESF project with limited duration (2 years). However, most of the project initiators and partners are also included in other networks, which could probably ensure follow-up of the project.

Feedback

Final report to be expected soon, as the ESF funding ended up in 2007.

Vuurtoren45+ is also included among the good practices selected by the King Baudouin Foundation in its programme on ageing and intergenerational relations, which addresses not only work, but also community life, housing and urban planning, care for elderly.

Sources

Project web site: www.vuurtoren45plus.be (in Dutch)

Other relevant aspects

Besides the Vuurtoren45+ project, most of the project partners are also involved in “Jobkanaal”, a labour market intermediation service specifically targeted to disadvantaged groups on the labour market: 50+ workers, migrants and disabled persons.

6.3 Knowledge Pool 50+ (Belgium)

Public initiative at the regional or local level

General presentation

The “Knowledge Pool 50+” is a project initiated by four private Flemish companies and the Chamber of Commerce of West Flanders (with the support of the Flemish agency of the European social fund). The aim is to find out how these aged workers can be better integrated in work, both in a profitable way for the companies and in a satisfying way for themselves. The purpose of the “Knowledge Pool 50+” project is to give older employees an active role in the transfer of explicit and implicit knowledge by giving them a role of “experts” and trainers for their younger colleagues.

In a first step, voluntary workers collaborate to the identification and to the recording of their experience and know-how.

In a second step, training modules are developed on the basis of this collection of knowledge. Such project requires that the companies give time to their agents to engaged in such a long term training and guidance process.

Type of initiator

The Knowledge pool 50+ is a project supported the Chamber of Commerce of West Flanders AND co-funded by ESF. Other partners are the provincial industrial high school and Randstad Interim (a temporary work agency). VOKA (Flemish federation of enterprises) joined the project in 2004 and gave a new impulse to the project.

Four industrial companies in the region of West Flanders join the project.

- Proviron is a large chemistry company. It recently started the large-scale production of biodiesel.
- Bekaert is a global company. The company is active in three core areas: advanced metal transformation; advanced wire products and fencing systems; advanced materials and coatings.

- Thermote & Vanhalst is an international company that produce forklift trucks, aerial platforms and industrial in-plant vehicles.
- Deceuninck Plastics is an international company producing PVC products for building.

All partners expressed their willingness to invest in knowledge transfer with their senior staff and to develop an age-minded human resource policy.

Target groups

Knowledge pool 50+ was developed for the target group 50+, who are the more experienced and have on-the-job knowledge. Participation to the Knowledge pool 50+ is on a voluntary basis: participants aren't seconded from their job and they don't receive any extra payment for their participation to the project. However, according to Miet Lamberts (see reference below), "they are motivated because they can learn a lot and they are valued for their extra work by management and colleagues".

Tools

The knowledge transfer is organised through working groups driven by managers. The work of these groups is organised in three steps:

- In a first step, pools of older workers generate know-how on methods and tacit knowledge in companies.
- In a second step, tacit and explicit knowledge is mapped. During the first "recoding sessions", the effort was dedicated to the capture of the explicit knowledge. However, it quickly appears that it was fruitful to identify and clarify the tacit knowledge.
- In a third step, this mapping is translated into training modules dedicated to younger colleagues.

Duration of the action

The project was initiated in 2002 and it currently continues in four companies.

Possible feedback

An evaluation of the project was led by Johan Lambrecht and Diane Arijs from the Studiecentrum voor Ondernemerschap (SVO) at the Flemish Catholic University of Brussels. They questioned the participants to the project after two years. Most of the evaluations are positive:

"I learned within this project that making your knowledge available for or pass on to your colleagues gives you a stronger instead of a weaker position in the company. We even started with an own parallel project of knowledge guarantee. Our staff director prepares his professional testament for his successor by the time of his pension" (Claude, employee at Bekaert Engineering, active in metal transformation and coating, located in Ingelmunster, December 2004).

"Although our company has not yet the typical greying age structure, the project was very useful to reevaluate our employees with a higher seniority. They are responsible for an entrepreneurial business culture and disseminate the values and vision of the company. They serve as an example to others. We even hire now more people with a long-term experience"

(Gerd, resource manager at Thermote-Vanhalst, active in treatment and transport of goods, located in Waregem).

Besides these positive evaluations, Eric Kenis, of VOKA (Flemish federation of enterprises) emphasises a negative element of the project:

“We could realise this project thanks to the co-financing of the ESF. Up to now companies are not willing to invest on their own in knowledge transfer, knowledge guarantee and coaching by 50+ employees. The government will have to jump in. The government can recover the costs by the higher employment rate of 50+ persons”.

Evaluations were also organised in participating companies to decide if they will continue to collaborate or not to this project. For example, after a first successful experience, the management of Proviron decided to ask for new volunteers who were rapidly found. When it started, the project was restricted to some production units of the company but it was progressively broadened.

In a methodological perspective, questions like “how can tacit knowledge be made explicit”, “can the older workforce function as a coach for their successors or become an organiser of courses” were focused on during this Knowledge pool 50+ project.

Sources

Lamberts, M., Employment and labour market policies for an ageing workforce and initiatives at the workplace (Belgian report), EIRO, Dublin, 2007.

On the website of the European foundation for the improvement of living conditions:

(Proviron) <http://www.eurofound.europa.eu/areas/populationandsociety/cases/be007.htm>

(Bekaert) <http://www.eurofound.europa.eu/areas/populationandsociety/cases/be002.htm>

Other relevant aspects

The Knowledge pool 50+ project was initiated by the same network of actors than the Vuurtoren 50+ project also described in our report. However, we selected this practice because it concerns directly private companies and focuses on the organisation and evaluation of a knowledge transfer process.

6.4 Start again after 45 (Italy)

Public policy, implemented at regional level within a partnership created for the utilisation of the ESF, in particular of programme EQUAL

General presentation

The Italian labour market as most European countries is characterised by profound demographical and legislative changes. For what concerns the demographical changes there is a more and more increasing life expectancies and one of the lowest fertility rate in Europe, which means that there is also an increase ageing of the workers. In addition, there is also profound legislative change in the pension system (law no. 243/2004) that increases the age to become pensioner

These demographical but also legislative changes in the labour market and the strong competitiveness, force the enterprise to change their organisational culture especially for what concerns the management of the ageing human resources.

Indeed, the project “Start again over 45” has the general aim to implement a new organisational culture and a new management of the human resources in order to emphasis but also to ameliorate the professional competencies and abilities of the older workers (over 45 years old). The idea behind this good policy practice that older workers represent a resource and not a burden for the organisations. More precisely, “Start again over 45” has two aims.

First of all, it has the aim to select older workers in order to give them a chance to start a second or even a third career inside the organisation where they are already employed. It can be either a private enterprise or a public organisation.

Second, it prevents the organisations from negative effects related to the aging of its workers such as old professional competencies, long working hours and a decrease in workers’ motivation at work.

The project has therefore the aim to manage in advance ongoing changes and to support the human resource staff and, in particular workers over 45, evaluating and recognising their former professional experience and to re-evaluate their role inside the organisations.

The project combines both activities in which the enterprises are involved and specific actions targeted to older workers.

There is a preliminary phase in order that the project can start in which there are different planned meetings between the head of the organisations (line managers, human resource ect.) and the labour consultants from a consultancy company (Moore Rowland) or counsellors and than meetings between the counsellors and the older workers employed in the organisation.

The aims of the first meeting between counsellors and the organisation were the following four:

- To gather information about the principle characteristic of the organisations and the model of the human resource management;
- To understand the instrument and the accustomed practices of the human resource management
- To understand how each instrument is adopted and implemented;
- To gather all the information about the working position inside the organisation and the work itself of the older workers.

The methodology used by the counsellors for the first meeting is a questionnaire with the aim also to gather the information about the composition of the work force in the organisations.

The second meeting more precise has the aim to give to the consultant all the information in order to build the “age pyramid” and to understand at which level and who are the workers that are blocked in their career advancement due to their age.

Therefore it was important that the consultants could gather information about the composition of the workforce in terms of sex, age, working position, profession and about the different departments of the organisations in order to understand where there are the more critical situations. Most organisations involved in the project already had a database about this information and for those who didn't a new database was realised.

In the third meeting, the consultant gave a feedback to the organisation thanks to all the information gathered before and proposed some interventions/actions, which was discussed with the managers of the organisations.

After the third meeting the consultant continued to gather information about the organisation in order to see if the intervention/action decided could be effective or not. In particular he/she gathered information about the following:

- The recruitment strategies;
- Strategies and practices of the management of the knowledge and the internal know-how;
- Information about the working conditions and the different ways in which the organisations permits the reconciliation between family life and working life.

After all these last information are gathered the consultant made his/her last action plan.

The different actions are divided up and realised in three in different phases.

- Phase 1: Diagnostic actions inside the organisation (both private and public) using instrument of management resource and organisational production such the analysis of the age pyramid, the management of competences and of professional careers, the analysis of the productive process. Thanks to the support through tutoring of the consultant, specific action will be defined in order to meet the specific needs of the single older workers in different organisation. This action plans are then given to the all actors involved in the good policy practice: both the head of the management and human resource of the organisation than the older workers for a final approval.
- Phase 2: Implementation of the planned actions inside the organisation: assistance to ameliorate the professional competencies, evaluation of out-placement in other organisations, the re-organisation of the different processes in terms of rhythms and working practices, the transfer and the management of know-how of the organisation through a controlled exchange of competencies between the workers of the organisation.
- Phase 3: This phase starts with the beginning of the project and goes through the whole project. It foresaw all different activities of dissemination of the project towards the different actors (social, economic and institutional) of the area. This means all the activities of communication and information of the project and sensibilisation of the different economic and social actors on the importance of re-evaluating older workers and the related benefits of such policy practice. The main target group of the dissemination action were: Chamber of Commerce, social partners both trade unions than employers' organisations, local authorities.

Type of initiator

The project is co-financed by the Piedmont Region with European funds from the Equal programme Equal. The head co-ordinator is Tecnorete, the consortium for the promotion of the image and the activities of the Technological and Scientific Centre of Piedmont.

Other partner of this policy practice were:

- Poliedra
- Moore Rowland (a consultancy company)
- Fondazione Adecco for equal opportunities
- Loro Piana
- Consorzio HD.

Target groups

The target groups were 70 employees over 45 years old employed in 12 organisations based in Piedmont Region. The organisation that were involved in the project were both private in different productive sectors than public organisations and local authorities based in Piedmont

Tools

As stated in the general presentation, there was a “third phase” that foresaw a specific dissemination action toward the more relevant social, economic and institutional actors with the specific aim to awaken the actors about the importance to evaluate older workers as precious resource for through organisation and not a cost. The aim was to change the mentality and organisational culture of the actors in the area of Piedmont. In other words, to create a new vision.

The tools utilises where leaflets but also promotion on the different website such as those of:

- the social partners,
- the Italian television (Rai)
- the Piedmont Region,
- the Equal programme,

Duration of the action

The duration of the project was one year from 2004 to 2005.

Feedback

The feedback was very satisfying. More of the half of the employees find a better position in the organisation, were out-placed or more satisfied with their jobs.

The organisations were therefore able to overcome the risk and the negative effects of the aging of their workforce such as difficulties in finding new workers for the same position, the demotivation of their older workers, which lost their hope to receive a career advancement. In addition they renovated their organisational culture and were able to sensibilise also other social and institutional actors to rethink to the human resource management in relation to age discrimination.

Motivation for selection

The first motivation for the selection of this good policy practice was the strength of the project idea i.e. to combat the age discrimination inside the organisations themselves in order to avoid the risk of social exclusion due to age discrimination. Indeed, the aim is to support the older workers inside their organisation to remain competitive through a training and re-qualification involving different actor of the area.

The second motivation for the selection, it relies on the main results that came out from the previous research phase of SPReW - WP3. It came out from the narratives but also from the focus groups that have been realised for WP3 how important the training for older worker is to stay up-to-date, to professional competitive which leads to tensions among generations.

6.5 “Mec - Lab” – new horizons for workers over 45 years old in the mechanical industry of Bologna (Italy)

Private initiative, developed at company level

General presentation

The good policy practice “Mec – Lab” is a collective agreement signed between the social partners of Bologna, the capital of the Emilia Romagna Region in Centre Italy,. Moreover, the agreement has been signed in 2006 by the trade union Cgil of Bologna and the industrial employers’ organisations (Fav – Unione Industriali) of the same city.

The aim of the collective agreement “Mec – Lab” was to support older workers over 45 years old both men and women employed in organisations of the mechanical industry supplying them with personalised and specific vocational training courses. The main topics of these training courses were the professional skills and competences needed inside the organisation and for the more general productive process.

These training courses, that have been agreed between the social partners, have the aim to maintain, valorise and ameliorate the professional competences and skills of the workers over 45 years old employed in the organisations according to the technological and organisational innovation that occurred inside the organisation and in the economic process in which the organisations were embedded.

Therefore, this collective agreement in line with the European policy framework intended to combat the risk of social marginalisation of the older workers and the ageing process of the workforce. In addition, it intended to combat the stereotypes and prejudices related to older workers inside the organisations.

The good policy practice consisted in four following phases and activities:

- The first phase consisted in some meetings and seminars between the social partners and the managers of the organisations in order to analyse more in depth the ageing process of their workforce. This analysis gave the opportunity to identify more specifically the older workers who needed more support in innovating again their competences and to define some specific measures for them, that prevent the ageing process and combat further marginalisation of the workforce.

- The second phase consisted in focus groups in which different actors. First of all, of experts working in different departments the organisations such as the research and development, human resources, computer department etc. Secondly, at the focus group participated the older workers, which were at risk to be marginalised in the organisations. Then participated at the focus group the social partners and the managers of the organisations. The aim of these focus groups was to understand which competences and skills were required from the organisations and in particular, which competences didn't possess older workers employed in the organisations;
- The third phase started an analysis of the professional competences of the older workers and offered guidance to rethink their working career and their future work perspectives inside the organisations. In this phase the skills and competencies of the older workers have been mapped. Then, the expert guidance practitioners gathered the socio-demographic data from the older workers and gave them a questionnaire to define and assess their professional skills in order to plan a specific vocational training for them. Finally, the older workers received guidance which took the form of a personal meeting with a guidance practitioner;
- The fourth phase offered vocational training courses and seminars lasting 40 hours targeted to the older workers with the aim of up-dating and ameliorating their professional abilities. The competences that have to be ameliorated were on one side the specific-technical competencies, especially their ICT competences; on the other side also social and organisational competences like the capacity of having good relationships with colleagues and head manager, to know how to negotiate, to manage time etc. Teaching material and documents have been given to all the participants of the project during and after the course.

Type of initiator

The type of initiator consisted in the following different social and economic actors:

- the organisation in the mechanical industry which wanted to avoid an ageing process of their workforce;
- the social partners - trade union (Cgil) and employers organisation (FAV – Industrial Union) of Bologna – that promoted the policy practice;
- the vocational training centre that offered the training course, the seminars and guidance to the older workers;
- the regional representatives that have been awoken to the question of ageing of the workforce.

Target groups

50 older workers over 45 years old both men and women employed in the enterprise active in the mechanical industry based in Bologna (Centre Italy).

Tools

The project “Mec – Lab” has been promoted and disseminated with different tools: dissemination inside the organisation of invitations to the seminars; realisation of a website with the description of the project; realisation of a Web site community dedicated to older workers.

Duration of the action

The duration of this policy practice have been eight months from September 2006 to April 2007.

Feedback

The policy practice has been positive. The main results acquired were the following:

- The older workers had more confident and felt more satisfied after the training course because they have been socially recognised by the in their organisation;
- The older workers felt more competitive and motivated to work;
- The stereotypes and prejudice against older workers decreased;
- Awaken of public opinion of the importance to combat ageing process of the workforce.

Motivation for selection

The motivations of selection were several.

Firstly, it was important that a collective agreement had been signed b the social partners to combat the ageing process of the workforce and to combat the strong stereotypes and prejudice against older workers inside the organisations

Secondly, from the results based on in depth-interviews and focus group it came out how the relation between generations can be tense because of an existing “technological divide” between younger and older workers. Older workers “fears” have not to have sufficient up-to-date professional competences and that they could become not required anymore.

Thirdly, the more general awaken of the public opinion toward the importance older workers and to gave them a full recognition them

6.6 Somague Engineering (Portugal)

Private practice implemented at company level

General presentation

Since 1993, age management strategy in Somague, a private national company in the construction sector, is based on the idea that age and experience can be very useful - in certain activities. The permanence of older people in the company is related with the added value that a large experience may provide. In turn, the company takes the necessary steps for them to stay. Age management policies are based on the principle that older workers (>45) are assets and not liabilities. What seem important its people’s capacities and also their professional aims.

Several age management related practices in the company include: (1) more experienced workers are often called to solve difficult problems in construction sites; (2) more experienced engineers are useful to coach younger engineers that are recruited every year; (3) every new engineer makes a tour on every back-office department where older colleagues make them aware of the business intricacies; (4) salaries and promotions are determined by performance evaluation – an internal ranking is established; (5) evaluating and understanding

capabilities and objectives of workers in the company are key issues in annual evaluations – position change is possible; (6) training is also possible in order to promote better adjustment between capabilities and aspirations.

Type of initiator

Somague is one of the major private companies in the civil construction and public works sector in Portugal. It is a result of a fusion of two construction companies in 1998 – Somague and Soconstrói, with a legacy that remounts to 1947.

Target groups

The target groups are senior workers over 45 years old.

Tools

The instruments used in Somague Engineering include: coaching sessions; performance evaluation; training; top management involvement and belief; simply listening to people.

Duration of the action

The Somague HR policies concerning older workers are permanent actions in the HR management strategy.

Possible feedback

The evaluation of the HR management developed by Somague, and that include the age management strategies described above, show that: a) the “added value per worker” increased significantly (50.293,54€ in 2000 to 71.560,20€ in 2003); and b) the “average labour costs” increased significantly (around 31.256,65€ in 2000 to 42.321,54€ in 2003) - that is to say that the average salaries have increased in recent years. It is not possible to definitely conclude that the implemented policies of age management were successful but these are indicators pointing in that sense.

On the other hand, Somague has grown in recent years from the national context to the global market and has now businesses all over the world. This fact may be directly, or indirectly, related to the age management strategies. Nevertheless, employees and managers agree that the age management strategies had a positive effect on the quality of work and on the feelings of older workers towards the company - Older workers feel important to have recognition for their knowledge acquired in the “field” and are more flexible and open to arrangements that render their staying viable.

Sources

The main sources include the recent final report of the European project “Ageing and employment: Identification of good practice to increase job opportunities and maintain older workers in employment” and the consultation of Somague’s website (www.somague.pt).

Other relevant remarks

It seems that family enterprise values are decisive factors determining the company’s organisational culture and, consequently, the company’s attitude towards older workers, acting as a facilitator for active ageing.

6.7 Project AQUA_mark: Good policy practices for companies and employees in small- and middle-class businesses (KMU) (Germany)

Company initiative

General presentation

Project AQUA_mark: “Altersgerechte Qualifizierung in Unternehmen und Arbeitswelt” in the Mark region, which contains the city of Hagen, the Mark district and the Ennepe-Ruhr district.

The project AQUA_mark of the agency Mark GmbH in the city of Hagen is an official, operational and individual advisory service from demography consultants, executives from health insurances, chambers of craft and staff associations. Regarding the demographic changes in the Mark region companies and businesses are “well advised to keep their employees healthy, qualified and motivated in the long run to come up to the shortage of skilled labour, that certain regions and branches are already suffering under”.⁸

Target group

The project „age-based qualification in companies and the working world (AQUA_mark) is directed towards small- and middle-class companies (KMU) with 250 employees. Among the companies AQUA_mark especially aims at employees of both sexes over 40 that have not taken further training for at least 10 years. Furthermore it tries to assist the management at the implementation and systematisation of a staff-development strategy. The regional training providers are implicated in the project, too.

Type of initiator

Project phase 1: Development of an integrative concept for an advisory service: agency mark GmbH in cooperation with training providers and counsellors.

Project phase 2: Execution of the integrative concept for an advisory service: agency mark GmbH in cooperation with companies, training providers, counsellors and health insurances.

Project phase 3: Information transfer: agency mark GmbH in cooperation with companies, training providers and counsellors

The agency *mark* GmbH in the city of Hagen has been operating the educational advisory service *bill_mark* since October 1st, 2006. They provide information and advice for a lifelong education of individuals and companies and therefore have taken over a central role in the regional dialogue of educational development.⁹

Duration

The project is scheduled from 1.01.2006 to 31.12.2007 and is financially supported by the federal state of North Rhine-Westphalia, the federal government and the European union.

8. Hilke Berkels, Bundesanstalt für Arbeitsschutz und Arbeitsmedizin: In: wie lernen ältere? Ein Leitfaden für Betriebe zur Gestaltung des demografischen Wandels. Herausgeber: agentur mark GmbH, 2007, Hagen, p. 14

9. cp. Wie lernen Ältere? Ein Leitfaden für Betriebe zur Gestaltung des demografischen Wandels. Hrsg. Agentur mark GmbH.

What is made concrete in the project?

Individuals, that are over 40 and suffer under/are threatened by unemployment, are in danger of being permanently excluded from the working society and therefore face poverty in the long run. The first campaign for awareness 50 Plus from the federal employment office (BA) has been appealing to companies since the millennium, to recognise the problem of demographic change, to take over more social responsibility for the elder generation and to alter a staffing and development policy that is too much orientated at the youth.¹⁰

The demand towards companies, to invest more in lifelong learning and personnel development, fell on deaf ears among small- and middle-class companies.¹¹

This is where the project applies and it has set the following goals: “The focus of the project AQUA_mark is an improved activation of the elderly, the increase of participation at general and occupational training programs and therefore the securing of employability. This goal is to be reached by the design of individual, advisory supported, goal setting processes with elder employees. For an increased motivation during the initial stage they are not limited to the operational level, but are orientated integrally and may also include the formulation of perspectives for the time after employment”.¹²

What are the results?

In the first project phase a concept for an advisory service and an instrument of evaluation for the advisory service were developed. During the second project phase an individual action schedule, which contains goals and possibilities for a practical conversion, for every employee was formulated. For each participating company an operational “competence and education check” was arranged. Within the „regional expositions for professional development the concrete demand for further training has been passed on to training providers. The manual “How do the elderly learn”? was developed for educational institutions. The manual is supposed to reduce existing prejudices towards elderly employees and it contains, for instance, 4 check boxes for an age-based training and qualifying of employees. In the third project phase the following goals were reached: a) Further training for educational institutions with the focal point “How do the elderly learn” and advanced training for counsellors and a lot more. For the regional and federal actors transfer work shops have been executed and the presentation of results of the project AQUA_mark. Products for staff and company associations are also available.

Feedback from research

“More widespread than a comprehensive generational plan for personnel development today is the planning of personnel layoffs of elder employees. And while events for sensitisation and ‘Tool-boxes’ disperse immensely, to get companies to ‘rethink’, the operational implementation of commonly accepted concepts stagnates. The demographic discourse mostly remains on the level of desiderata. On the other side there are exceptions: Companies, actually realising new methods of qualification and a skill-building work design, with the goal of maintaining and supporting the efficiency and employability of employees in the long

10. cp. Conrady, Helene (2001) Über 50, die können’s. In: Die Mitbestimmung vom 11/2001, p. 19 f.

11. cp. Morschhäuser, Martina (2007) Berufsbegleitende Weiterbildung für Ältere. Zukunftsaufgabe für Betriebe, Beschäftigte und Gesellschaft. In: Soziale Sicherheit, Heft 4, p. 142

12. Quotation taken from the project sketch of the agency mark GmbH, which A. Bendig send us via email at 17.12.2007.

term”.¹³ “Responsibility for experience” is an initiative several companies of the city of Hagen participated in. They specifically aimed at employing workers over 50 years and provided further training. Examples for good practice can be found in the brochure “Verantwortung für Erfahrung. Wie Hagener Unternehmen den demografischen Wandel gestalten” from the agency mark GmbH and the Stadtmarketing Hagen e.V.¹⁴

7. Reported good practices not selected

The national partners have indeed selected a greater number of good practices than the ones presented above. Nevertheless, we have decided not to include them all in the reported collection so far, for a series of reasons.

The most frequent one is represented by the lack of **precise coherence with the scope of SPReW**. Some national good practices, in fact, are targeted only on one age group, one generation, or a too specific fragment of a certain generation, therefore the connection to the intergenerational perspective that the present projects aims at investigating is not outstanding.

It is the case of the Hungarian example of good practice at company level “Atypical forms of employment at Magyar Telekom”. The major Hungarian telecommunications company, Magyar Telecom Nyrt., tries to help the integration of work and family, on the one hand, by conducting a series of lectures on the topic where psychologist talk about the problem. On the other hand, they introduced telework as an atypical form of employment, which is not at all widespread in Hungary. With the help of that, mothers of young children or disabled people can also work at the company. The same advantage is given by the flexible working time and part-time work. In this case the target group represented by women with children, also disables, is only one, and even if it seems to be quite innovative and original, especially considering the Hungarian context at company level (see above), and even if the gender perspective is important, the intergenerational aspect is not present.

Almost the same reasons are valid for the exclusion of other Hungarian regional level practices: the “Operational Programme for Regional Development (Regionális Operatív Program, ROP)”, targeted to non-profit organisations to carry out employment projects for people in disadvantaged positions, is actually addressed to facilitate the integration of the Roma population. This condition is too specific and regards only one group with no specific reference to the intergenerational approach. Very similar remarks are valid for the practice “Sajó Area” employment project, targeted to long-term unemployed, especially Romas, aimed at trying to integrate them in the labour market by agricultural work, gardening, training and counselling. The practice represented by the “Southern Hungary employment pact” between the County Employment Centre, employers, local employment offices, training institutions, social partners and civil organisations, organising training programmes for people in disadvantaged situation and unemployed, even interesting, again does not put in light the intergenerational perspective. The reported practice “Northern Hungary collaboration for the region's young graduates” also regards only young graduates, and even if one of the tools is represented by counseling activities, this is not sufficient to identify it as intergenerational. At national level also the practices connected to the “START programme” to promote the

13. Morschhäuser, Martina (2007) a.a.O., p. 142

14. More information available at www.agenturmark.de

employment of career starter young people are out of our scope, as regarding only young workers, or only young parents with small children.

As a general comment, in the case of Hungary, anyway, it has to be considered that the specificities of the society and the labour market are mirrored in this selection, therefore, even if we did not chose them as good practices in strict intergenerational terms, they have to be considered as remarkable, whereas they are representative of some current concerns of the Hungarian society.

Also the Italian research has provided as results some practices, which are out of the intergenerational focus defined by the project.

“Apprenticeship for women in difficulties in the Province of Novara” is targeted to 70 women, unemployed single mothers, head of the family (female breadwinner family model), women more enrolled in the Employment Services for more than 12 months and over 45 years old with difficulties re-entering into the labour market. Promoting apprenticeship to develop new professional competences useful for re-integration into the labour market represents a definitely interesting try to re-include a certain group in difficulty, but there is a scarcity of intergenerational perspective. Also the practice aimed at the integration of young athletes into the labour market is out of our specific scope. The aim and the tools involved (support the professional integration into the labour market of the young athletes through apprenticeships, development of a network organisation to support and create employment, valorisation and increase of the professional competences - ameliorate the computer knowledge and the knowledge of a foreign language - are interesting, but the target group is represented only by young professional athletes among 20 and 35 – quite a narrow and specific category. Therefore, this does is a good practice of occupational integration, but with the generational datum is weak.

Some Portuguese practices presented the same limit as the ones reported above. Within ANOP programme, the practice named “Club of Local Life”, involving the use of informative sessions, informative actions, dynamic actions, and agencies of proximity services at regional level, targeted to 25 families with problems of conciliation of work-private life and 50 seniors, does not contain a precise intergenerational perspective in the sense of SPReW. The practice named “Programme Initiative Woman” was targeted again only young unemployed women with a degree, aged 23-35.

With regards to the French national collection of good practices, the example titled “In search for equality and diversity: an initiative of the firm *Eau de Paris*” has been excluded for lack of an outstanding intergenerational reference. It is targeted to all the employees (and especially managers) of the firm “Eau de Paris”, and aims at awareness raising on equality issues, facilitating good balance between family and work life for all employees, through production of an equality report, leaflets, campaign and finally commitment formalised in collective agreement.

As far as the German selection of good practices is concerned, two of them has not been considered as representative of a positive intergenerational approach, either because not too developed or because very sectoral and specific: one is represented by a collective agreement at company level for temporary workers from temping agency Adecco, employed by Audi, with low wages, aimed at increasing their monthly income through targeted contracts. The other practice is always a company level one, regards a age-based work-design in a collective

agreement, aimed at temporary adaptation of the personnel costs in change for long-term job security, and targeted at older specialised workers in a factory at risk of closure. Two more practices had been submitted: the model and initiative “Ausbildung - Bleib dran”, implemented at regional level and providing support and counselling for in conflict situations in companies or schools targeted to young men and women, Germans as well as migrants, employed in industry, trade or service, who plan to quit their vocational trainings, does not really have a specific intergenerational connotation. The same remark is valid for the regional practice “Perspective to work and job training“: it has been not selected here because of the target group (immigrants unemployed persons in the rural district of Hersfeld-Rotenburg) and because the organisation of language courses, socio-pedagogical supervision and practical courses only represent practices of inclusion with no specific intergenerational means.

A completely different point of view has been adopted with regards to certain practices that, in some cases, even containing the intergenerational datum, can actually not be considered as good as regards to the SPReW results. In this second selection — the first one having been performed by the national partners who identified them in a first stage —, the approach has been more *qualitative: in fact we have put in doubt the positive and constructive impact of these practices*, in the light of frequent mechanisms occurring within the labour market. The practices that we have excluded can be interested in the view of the study of the possible solutions that might be designed with the intention of stimulating inclusion of certain disadvantaged age groups, more often young people, but not only. Most of these practices propose either de-taxed labour for young inexperienced people, or for even highly educated young without working experience, or for aged workers who could find difficulties in re-enter the labour market, or not well regulated initial professional trainings for students, which should, in their intentions, facilitate the entrance of young people in the labour market providing them with first professional experiences. The problem with this kind of practices, however, is that sometimes they do not actually produce virtuous results. They sometimes also offer companies the possibility to use low paid workforce, easy to replace at the end of the favourable period, or introduce young students in a mixed scheme of work and study which constitute neither a genuine occupational situation nor a profitable period of education. The risk is to feed a vicious circle of passage from a “facilitated” form of not genuine employment to another, which rarely is actually useful to the young, and on the contrary stigmatises their situation of precariousness and exploitation.

A major concern was to avoid presenting as good practices measures that extend the integration paths of young people or that reinforce a generational dualisation of the labour market. From the point of view of employment policies, these practices can be relevant however as regards the SPReW concern that deals with relation to work and social cohesion, they can be discussed.

We particularly discussed measures pointed out in many countries that support the integration of young people with university degrees through traineeships or specific less paid and less secure status. Having to enter the labour market through specific less favourable status whatever can be the level of qualification cannot be considered as a good policy practice from the point o view of generational cohesion.

These practices in question have been identified by the partners in Portugal and Italy; however they present a scheme, which is replied in all the European countries. The Portuguese practice named “INOVOJovem – Young Graduates for the Innovation of SME” provides professional traineeships and specific support to immediate celebration of individual

contracts for the integration of young graduates (< 35). In Italy, it has been reported “The case of Adecco. High level apprenticeship and training for young workers with a university degree”. The target group consisted in 15 young people with a university degree working in different organisations, and the tool used to foster their integration was the promotion of two years contract of high-level apprenticeship and training.

In the mean of a commitment to the quality of work, we cannot consider the above mentioned practices as *good*. The integration of highly educated and qualified young workers should not foresee an unlimited extension of the paths of entrance into the labour market. These practices actually represent various forms of constraint precariousness (part-time work, limited-term contracts, ‘placements’ for which workers are often paid little or nothing, etc), which it is necessary to combat, being the unlimited-term contract the rule rather than the exception.

Part II

European framework and actors for intergenerational policies

1. Introduction

In the view of connecting the research carried out so far with a conscious and proactive policy making, it is not possible to ignore that employment themes related to generational and intergenerational perspectives have been approached within the policy making at European level as well. Moreover, it has to be remarked that several of the national policies that we have presented above have been designed in the view of the implementation of policies fixed at European level, to which the Member States are committed.

The policy practices that have been individuated at this level can *mainly* be reconducted to two fundamental *policy frameworks*, interrelated and connected, which have marked the last decades of European policy making in the fields of employment and social cohesion.

The first one is represented by the Lisbon Strategy and to all the policy interventions derived from it. In particular the economic and the social pillar come into interests as far as the first one provides the intention to make of Europe the most competitive, dynamic knowledge-based economy; and the second one designed in order to modernise the European social model by investing in human resources and combating social exclusion.

Another element has to be considered, though, and as an important aspect to be integrated and mainstreamed in all the occupational and social policies designed in the framework of the abovementioned economic and social strategy over the last years: the demographic one.

Over the last 50 years, in fact, Europe has seen much economic and social progress, and an increasing of the life expectancy of its citizens. This increased lifespan certainly represents a good achievement, but, at the same time, it poses main questions for individuals, families, social systems. These questions have to find responses within the occupational framework, and in deep changes in social policies. Moreover, the ageing population and the low birth rate, have to be combined with a series of economical, occupational and development exigencies deriving from global changes, which even more impose the European Union to re-shape family, occupational, social security, social cohesion policies, all in the light of what has been named “the demographic challenge”.

The different perspectives involved in these policy frameworks, the economic, the occupational and the demographic ones, have been object of several policy interventions, which tackle, from time to time, one issue more than another, but always showing a certain link among the different elements. In particular, the demographic issue has recently been integrated in the relaunched Lisbon Strategy (2005).

Several actors have intervened in the topic on the European scene. Each one has approached it in a different perspective, as it is normal, given that it can be considered as related to different

policy fields. The political actors, in particular the European Commission and Council, but also other stakeholders, as social partners and civil society organisations, have all taken part to a debate that, from the same starting point (the demographic datum) has been then developed following different thematic lines connected to employment. The point in common, in spite of the differentiation of actors and of thematic approaches, seems to be represented by the necessity to better investigate and face the consequences of these demographic phenomena within the European economy, labour market and the European society in general.

With specific regards to the scope of the SPReW project, it has to be bared in mind that the demographic perspective does not exactly correspond to the intergenerational one that we mean to investigate. And, with regards to the Lisbon Strategy, it is not even the lonely perspective in which generational aspects treated in the view of social cohesion can be framed. Nevertheless it is a fact that the demographic challenge has justified a series of interventions in different fields, so that nowadays we can say that it is within this perspective that several policies *also* involving generational and intergenerational aspects have been undertaken.

As a matter of fact, the generational perspective at European level has often been considered in the light of the demographic change. And, on the other way round, as far as our research is concerned, keeping into account the way of facing the demographic issue has meant, more specifically, has meant to consider the generational data connected to it.

This remark also justifies the fact that sometimes, in carrying out and reporting the results of the research, reference is made both to the *generational* and the *age* aspects. In the results submitted so far regarding the national realities, it has often been underlined that the two concepts – *generation* and *age* - can not always been used as interchangeable. At the European level this happens, and we have to take it into account.

2. Selection criteria: difficulties and choices

The task of individuating *inter*-generational policies and initiatives undertaken at European level, aimed at fostering the social cohesion through enhancing better relations between generations at work, has been not easy. The complexity of the research was due, at a first stage, to the not always direct approach to the generational (and even more to the *inter*-generational) perspective we mean to investigate, and to the nature itself of the policy instruments enacted at European level.

The difficulty has not exactly been due to a lack of interventions regarding this topic. In fact, in the last years the attention to the demographic change related issues have increased, and they have been considered as affecting several points of the social and occupational agenda of the European Union and of all the connected activities. A major problem has regarded the fact that many European level policies *might* involve the generational perspective, but seldom tackle it lonely and directly. They mention it as a point to keep into consideration within the widest policy frameworks and the most diverse contexts, and reference to it is often connected to exigencies of completeness and mainstreaming.

On the one hand, this is more than comprehensible: the European Union policy making bodies and all the subjects at European level act at different title following very well determinate priorities, and, for the most, in a perspective of *coordination* of lower levels at which policy

implementation is finally realised. The policy instruments, in particular – but not only - those enacted by the institutional actors, therefore require a certain level of generalisation, aimed as they are at coordinating in a certain direction more than at directly regulating in details certain policy areas (the occupational and the social ones in particular). Within wide and often general political contexts and frameworks of intervention, fixed at the higher political level, the topic of “generations-at-work” is often tackled as an instrumental issue.

On the other hand, it has been not easy to isolate, among many references to the issues connected to work and employment, those who are more relevant and better targeted to the scope of the SPReW project. Therefore a huge part of the work consisted in individuating generational related policies, which have been treated within different and broad contexts.

Another difficulty has been represented by **the huge number of policy makers and possible initiators of good policy practices, which are active at European level**. The initiators in question might be first of all institutional, the EU decision making bodies and institutions, as the European Council, the European Commission, and all the General Directions responsible for different policy areas, but also social partners and civil society organisations.

As a matter of fact, very “prolific” authors of policies which interest the intergenerational relations are the institutional ones, and this is one of the reasons why several practices reported herein under have been initiated by them, and, in particular, by the European Council and monitored and developed by the Commission, within the scope of its competencies. The importance of these policy practices is outstanding: policy making at this level should involve the respect of what has been stated in all the collateral and lower levels, with direct impact, for example, on the policy designing of the Governments of the Member States, but not only. Policy making at this level obviously impress directions to the whole activity within the Union.

Other important actors are the social partners organisations, active at European level, and in particular the trade unions. But also research centres and civil society organisations have a role, within their field of interest, in the development of good practices, that, from time to time, might regard intergenerational issues connected to work.

Following the above-mentioned remarks, we had to surrender to the objective impossibility to report all the European level interventions, undertaken by the several subjects, which somehow consider the generational perspective in employment and social fields. We decided to focus only on those practices enacted with the aim of fostering a better social cohesion through enhancing better relations between generations and age groups at work. Therefore, we have selected those practices that, within different contexts, pursuit a better integration between generations at work, and do it even *instrumentally*, though having been specifically designed to tackle broader and more general aims.

The criteria on which we based our selections are several, and respond to the exigency to frame the generational relations as treated at European level within **different employment related contexts**.

Starting from what is considered as the broader of the contexts in which we tried to identify generational related approaches at European level, it is not possible to ignore the main framework established by the EU decision making bodies, which is represented by the Lisbon Strategy, developed through the European Employment Strategy and the Employment

Guidelines. Within these wide ranged milestones of the EU policy, the generational approach has been underlined as of relevant importance. In particular, in the view of the goals of reaching full employment and more and better jobs, within an overall perspective of economic growth, policies aimed at active ageing and greater youth employment, as well as more occupational chances for women, have been promoted. The importance of quoting them here does not only resides in a conceptual necessity to provide a **general framework** of the EU policies with regards to employment, social protection and social cohesion connected to occupational but also generational features. It is also given by the impact that these EU policy directions have on the overall activities of the different stakeholders involved at European level and on the policy planning of the national governments. This policy practice represents an outstanding example of how the generational issues have been approached at European level, as a mainstreamed theme which assumes relevance under several points of view, within the objective of economic, occupational and knowledge growth to which the whole European population, regardless its age, should benefit.

More specifically, as mentioned above, one of the most important issues treated in the last years is represented by the **demographic challenge**. The necessity to face the demographic change and the ageing of the European population in a proactive and constructive way has been object of mainstreamed approaches in several policies that regard employment, occupational, educational features. In particular the European Commission, on a Council's mandate, has addressed the issue in generational terms, with the specific objective to promote "a new solidarity between generations". The EU policy approach with regards to the demographic change has developed, through the involvement in the debate of several actors, in terms of *transforming the challenge into an opportunity* not only for achieving economic and competitiveness aims, but also for improving the level of employment in Europe and the working conditions of workers and citizens of different generations. In particular, promoting solidarity within generations responds also to the exigency to include women in the labour market, and to develop family policies among the Member States aimed at strengthening intergenerational solidarity by encouraging a better response to the needs of families with regards to childcare and dependency care and a more balanced distribution of family and domestic responsibilities. Through the emphasis placed on equality between men and women and equal opportunities more generally, the Lisbon Strategy constitutes a suitable framework of support for the development of national family policies.

Within the same context of the demographic challenge, another practice has been reported here, initiated by another important European level actor, the trade unions organisations confederated at European level in the European Trade Union Confederation.

A correct and cohesive approach to employment in a generational perspective is revisable also in the context of the **fight against discrimination** based on age. It represents another aspect of improving cohesion between generations and fostering social integration. A good policy practice in this view is definitely represented by a piece of legislation applied at European level. We have reported a piece of European hard law, the Employment Equality Directive 2000/78/EC. This practice has been chosen as particularly effective, because capable to have a direct impact in the fight against age discrimination within the Member States and, as a consequence, at the workplace level.

With more specific regards to the promotion of **equality** in the field of employment, EU initiatives have been undertaken in order to finance projects and different kind of interventions aimed at promoting cohesion between generations in relation to employment. In

the framework of the European Employment Strategy, and with the specific aim to develop its four pillars, the Community initiative EQUAL has been launched in 2001, in order to finance, within the framework of the European Social Fund, projects carried by transnational development partnerships, implemented within the Member States at regional level. In this framework also the implementation of gender equality and balance of working and private life have been tackled. In particular, in their reports on national policy practices, the Portuguese and the Italian partners have underlined as remarkable some projects implemented under the EQUAL Community initiative set at European level.

The above mentioned initiative, but not only, is important also with regards to the context of **education**, as a vehicle to support intergenerational learning on the workplace. One of the aspects treated within the context of equality, the validation of formal and not formal skills acquired in the course of the working life, is particularly relevant also in the view of promoting **Life Long Learning**, in order to ensure a better and constant growth of the workforce. This step of recognition of certain capacities is important under several points of view, in the European perspective of a knowledge based working society. The context of the education all along the life course, represents in fact another ground on which intergenerational relations can be developed in a proactive and positive way. As the national practices also underline, knowledge management constitutes a meeting point between older and younger workers on the workplace.

Another transversal thematic area, which presents a strong intergenerational connotation, is represented by **social protection**. The demographic change, the continuously increasing ageing of the working population and the not always “illuminate” social protection policies enacted in several Member States so far, have led to serious concerns on the sustainability of the current pension systems. The aspect is transversally taken into account in almost all the policy practices we have analysed, as a possible source of tensions within generations. In fact, solidarity between generations could be jeopardised if the burden of ageing had to be carried by the younger population, decreasing in number and economic strength. Remedying this situation is one of the priorities of the new pact between the generations. The policy approach is in the sense of designing new social protection policies and systems aimed at ensuring a *fair intergenerational balance*.

Looking at all these practices as a whole, some general remarks with regards to the outcomes of the research from the specific point of view of the *intergenerational* approach, can already be drawn. As for the national practices, we tried to focus on the ones specifically referred to intergenerational issues. Nevertheless, apart a normal degree of generalisation within the European level policies, in our research we also registered that, even when the generational issue is directly tackled, a certain degree of the **fragmentation** encountered at national level through the analysis of the good practices, is revisable also at the European level. A differentiated approach targeted to specific age groups seems to be necessary, in consideration of the different approaches to employment of older and younger workers, who may suffer a lack of social recognition for different reasons. Therefore it has been immediate to individuate policy initiatives targeted either to the young or to the older workers, as the instrumental policies for active ageing and youth employment. Nevertheless, some policy instruments set in order to implement the overall objectives in all their specific features and aspects involve practices addressed to different generational groups at the same time. It is the case of some policies within the life long learning framework, of policies enacted through financial initiatives as for EQUAL, more specifically tackling the need to increase mutual integration between generations and develop intergenerational paths of cooperation and cohesion. This

consideration, and an *integrated view* of the policy contents and aims, will show that the European level policymaking pays a huge attention to the intergenerational dimension.

Under this point of view, as far the **gender perspective** is concerned, almost the same consideration made for the good practices analysed at national level is valid also at the European one. The issue is particularly sensitive and there are series of initiatives of the most diverse kinds (EU level policies, EU hard law pieces of legislation, social partners agreements, awareness raising campaigns...) all aimed at increasing the participation of women to the labour market, conciliate work and private life, grant them equal opportunities and equal treatment with regards to employment, fight against gender discrimination in the most various and sophisticated forms. Nevertheless, the generational dimension is not always clearly connected to the gender dimension. The generational perspective lacks of gender approach also at European level. This outcome is particularly worth to be kept into consideration for the importance of the European level policy making, as this is capable to impress a boost to the investigation of the gender related issues in an intergenerational perspective and in the adoption of adequate measures to increase social cohesion within the working society also under this point of view.

The selection of good practices at the European level will propose a way into a set of relevant policies regarding the SPReW issues. This way into those broad and complex policy instruments will point out the dimensions that frame the intergenerational issues in the area of work, at the European level.

A last remark is worth to be made in this introductory methodological section. The national policy practices have been described following a certain scheme, which will be taken, into consideration also for this section of the paper. Nevertheless, the complexity of describing highly structured, tentacular and interconnected policies, the number of actors involved, the huge quantity of outcomes, which often develop only at the national level, will not always allow such a schematisation. In particular we will provide an analytical description of the policies taken into consideration for each context, and then we will deeply describe the policies in question.

3. Policy practices at the European level

The selection imposed by the complexity of information and data available at European level, and, above all, by the exigency of coherence with the scope of the SPReW project, brought us to individuate policy practices within different contexts. However, all these contexts at EU level are strictly interconnected and follow common lines of development, along the necessity to grant economic growth and, at the same time, to ensure the realisation of a certain kind of social model based on employment as a key feature in order to establish solid social cohesion.

The **broader context** in which almost all the policy practices we have individuated can be framed is represented by the **Lisbon Strategy**, declined in a series of policy steps and mechanisms through which the objectives fixed in 2000 and relaunched in 2005 have been pursued. The aim to reach full employment by 2010 and to create more and better jobs, making of Europe the most competitive knowledge based society have to be considered as the point of reference for all the related and more detailed policy initiatives which regard employment and social cohesion at the EU level. The European Union, as an economic actor on the global

scene, has a series of economical achievements to pursuit by keeping into account the investment in human resources and the overall social aspect. In this framework, the generational and the gender perspectives represent fundamental features in order to achieve the growth of the employment rate, and, as a consequence, a greater productivity and social cohesion. The demographic datum, in fact, and the one regarding the female employment indicate that it is necessary to involve older people and women into the labour market¹⁵, also trying to better integrate European youth in a process that necessarily assumes an intergenerational connotation. From a generational point of view, the European Councils fixes the objectives to improve employability and encourage a voluntary raising of the retirement age in keeping with the reality of longer life expectancy, facilitating a gradual transition from full activity to retirement and promoting the active participation of older people in public, social and cultural life so as to achieve the objective of active ageing. The approach widely adopted by several Member States to facilitate older workers' retirement in order to create new jobs for young people has been overpassed, also in connection with the necessity to face the consequences of the demographic ageing in the light of the social protection system. The integration of the two generations at work has been shaped under a different perspective. A return to sustained and sustainable growth requires greater demographic dynamism, improved social and vocational integration and fuller utilisation of the human potential embodied both by the older generation and by European youth. To this end, the European Council of Brussels in 2005 has adopted the European Youth Pact. With regards to women, the aim is to give them the possibility to be part of the labour market as much as possible: providing proactive child care solutions should allow the female employment rate to increase beyond their family duties.

Starting from the overall objectives fixed in the framework of the Lisbon Strategy, we have therefore analysed those features that more specifically regard the generational and the *inter*-generational approach. The **European Employment Strategy**, and the texts produced by the European Commission offer a significant overview of the level of attention, which has been paid to the integration of different generations within the labour market, in the contexts of the economic and occupational growth, which keep account of the demographic change. It is true that several communications and working paper regard the labour participation of different age groups¹⁶, following the directions of the Councils drawing the Lisbon Strategy. Interventions in this phase mostly regard only one age group per time. In particular, from the Stockholm European Council of March 2001, and the Brussels one in 2005 on, promoting active ageing and young people's full participation in employment and society seem to be primary concerns. In the view of the demographic change, the impression raising from the analysis of the key documents of the EES has to do with a general concern of the young people facing the increasing ageing of the European population. The European Commission, bearing in mind that it is necessary to operate generational policies in employment and social inclusion, also states "Young people will have to bear the growing cost of an ageing population, which calls for an intergenerational response"¹⁷. Nevertheless the policy making has kept into account all the concerns and has tried to promote common goals in order to reduce as much as possible perverse and negative generational impacts.

15. Lisbon 2000, , Stockholm 2001, Barcelona 2002

16. http://ec.europa.eu/employment_social/employment_strategy/key_en.htm

17. Promoting young people's full participation in education, employment and society, COM(2007) 498 final, http://ec.europa.eu/employment_social/employment_strategy/pdf/youthcom_2007_en.pdf

Therefore, on the one hand with the **Employment Guidelines** and, on the other, and even more specifically, with the Communications on demographic challenge, the EU response to these concerns is more and more focused on the intergenerational management of the workforce, on the promotion of a life-cycle approach to work, on more investment in human capital, on a better conciliation of work with family needs, on a stronger accent on long life education and training systems, and, moreover, on the consideration of the gender perspective, in the view of strengthening integration and growth. Also the aspect of the social protection is considered as a ground of possible tensions within generations: the perspective adopted aims at creating sustainable and equal pension systems specifically designed to share the consequences of the changing demographic situation and ensure a fair intergenerational balance. In fact, solidarity between generations could be jeopardised if the burden of ageing had to be carried by the younger population, decreasing in number and economic strength. Remedying this situation is one of the priorities of the *new pact between the generations*.

The specific **demographic approach** offers more details on the intergenerational perspective adopted by the EU decision making bodies, also because it represents a more practical one. The working programme addressed by the Council and the European Commission *via* the Communications connected to this issue¹⁸ should be developed not only in the specific guidelines that govern EU policy making: it is mainly addressed to the Member States who should try to harmonise their occupational and employment political plans in line with the EU guidelines provided by the Commission, but also to the other actors on the European level. The importance of the demographic change has deserved so far quite a number of interventions by the Council and communications by the European Commission, which are interesting also with regards to their proactive way of development as far as the policy making process is concerned. In fact, with the Green Paper "Confronting demographic change: a new solidarity between the generations", the Commission fixed the terms of the debate on the demographic issue, also opening a consultation to different subjects, calling them to express their points of view. Beside the policy practices expressed in the documents, the EC also decided to organise a major political conference on demography to support the debate initiated by the Green Paper. The conference brought together ministers, members of parliament, social partners, NGOs and independent experts with the aim of exploring some of the answers to the many questions posed in the Green Paper. The debate focused on the policy responses that are needed in areas such as family policy, work life balance, active ageing, migration and integration, role for the EU to allow our societies to cope with demographic change in a successful way. The final result of this policy process keeps into consideration the views of those who have taken part to the consultation: another communication has followed, as an integration of the contributions of all the participants to the consultation, which expresses an evolution of the perspective from *challenge* to *opportunity*. The demographic approach has recently (2007) seen a further development with the Communication "Promoting solidarity between the generations". The Communication stresses that national family policies have to respond to the needs of families as regards childcare and dependency care and a more balanced distribution of family and domestic responsibilities. This will lead to a better quality of life for all, as well as a situation, which is more conducive to the fulfilment of family plans. Moreover, by facilitating female labour force participation, modern family policies will contribute to growth and employment. The Communication also set and explains how the Commission will support the European Alliance for Families as a platform

18. Key documents available on line
http://ec.europa.eu/employment_social/spsi/demographic_challenge_en.htm

for the exchange of good practices and research. In the forms of the European political debate, also the European Parliament and the European Economic and Social Committee have expressed their opinions on this last policy development.

An interesting complement to the EU approach to the demographic challenge and connected intergenerational issues has been enacted by the European Trade Union Confederation, which has realised a project aimed at investigating the generational management within trade unions affiliated and has drawn some guidelines in order to try to smooth the difficulties and foster social integration with regards to employment. The project is interesting because social dialogue, intended as the exchange of views and the designing of specific proposals and solutions by and between the social partners, within more general and public policies or not, can definitely represent a fundamental tool for the development of proactive and targeted measures which bring to intergenerational cohesion.

Strictly connected to the Lisbon Strategy objectives, the European Employment Strategy and the principle of equality at work, the **financing Community initiative EQUAL** tackles a series of topics connected to the intergenerational perspective. In particular EQUAL has promoted the creation of transnational development partnerships, which have enacted projects, initiatives and actions in a number of thematic fields, defined in the context of the four pillars of the EES and following discussions with the Member States. The intergenerational dimension comes into interests in the actions in the field of *adaptability*, meant to be realised promoting lifelong learning and inclusive work practices which encourage recruitment and retention of those suffering discrimination and inequality in connection with the labour market, supporting the adaptability of firms and employees to structural economic change and the use of information technology and other new technologies. Therefore, trying to provide comprehensive responses to ageing, EQUAL has financed a series of actions aimed at developing new ways of dealing with age management and at supporting the intergenerational learning to balance the workplace, in the view of a multidimensional approach towards age, drawn upon a variety of methods and a holistic approach, which comprises several facets. Another thematic field fixed in the EES and developed through the Employment Guidelines and EQUAL regards the Equal Opportunities for women and men, which involves reconciling family and professional life, as well as re-integration of men and women who have left the labour market, by developing more flexible and effective forms of work organisation, supporting services, reducing gender gaps and fostering job desegregation. With regards to the gender issue, nevertheless, we have to repeat here what has already been mentioned above: we encountered a lack of generational perspective applied to the gender issues.

More in particular on the ground of **education**, the Lisbon Strategy and the EES provide that, in general, the education through all the course of life should offer learning and training opportunities tailored to target groups at different stages of their lives: young people, unemployed adults and those in employment who are at risk of seeing their skills overtaken by rapid change. These overall statements have been translated in a series of initiatives in order to provide, for example, IT education to older workers, a higher level of formal education to the young, and other activities which are targeted to specific age groups of workers. We have analysed here a particular aspect, which involves an interesting intergenerational perspective, linked to the informal and non-formal learning. It is widely underestimated, or lack recognition, in contrast to formal training, while, when employees and employers are unaware of employees' informal skills, both employees and businesses remain underdeveloped. This particular aspect has been considered also at the level of the **Life Long**

Learning programmes, and, more in particular, by the “**Education and training 2010**” integrated programme supporting the implementation of the Lisbon Strategy in the fields of education and training. This particular aspect of the educational strategy is interesting in the perspective of the intergenerational relations, in order to smooth the tensions and foster better integration: whereas a frequent opposition between the diploma of the young employees and the experience of the older ones has been registered, giving a diploma to the older workers it can facilitate mutual recognition.

The last aspect considered regards the legal instruments that the EU has adopted in order to ensure an effective employment equality, which also keeps into account the generational/age datum. Therefore we reported as a good practice the **EC Employment Equality Directive 2000/78/EC**, which responds to the need to tackle age discrimination on the work place. The legislative practice is addressed to all the Member States who are obliged to uniform their internal legislation in line with it. Furthermore, the law principles and the rights of all age workers are potentially continuously precised and updated by the action of the European Court of Justice, whose interpretations of the application of the directive and whose decisions represent an actual integration of the written legislation.

Analytical description

| Context | Policy Reference | Intergenerational aspects | Target subjects |
|-------------------------------------|--|---|---|
| General Employment Framework | Lisbon Strategy EES Guidelines for Employment (2005-2008 / 2008-2010) Active ageing Youth Pact Social protection issue | Objective of full employment and more and better jobs; raising of the older people and women employment rate; age management and incentives for older workers to stay longer on the labour market; integration of young people in the labour market; better conciliation between working and private life to increase women participation in the labour market; investment in human capital, through long life education and training for all the age group to increase adaptability. Promoting solidarity within generations ensuring sustainable and equal social protection systems. | Member States Governments National and EU level stakeholders |
| Demographic challenge | EC Green Paper “Confronting demographic challenge: a new solidarity between generations” 2005 Responses to the consultation European Conference EC Communication: “The demographic future of Europe – from challenge to opportunity” 2006 Forum on Europe's demographic future Demography report EC Communication: | Fronting the demographic challenge increasing employment rates, supporting youth, women and older employment; combining work and life-cycles; setting concrete support for families; ensuring sustainable and fairly balanced social protection systems; promotion of a new pact between generations. | Member States Governments EU level and national stakeholders Companies |

| | | | |
|-------------------------------------|---|--|---|
| | <p>“Promoting solidarity between generations” 2007</p> <p>European Alliance for families</p> <p>EESC opinion on the 2007 communication</p> <p>EP resolution on the demographic future of Europe</p> | | |
| Demographic challenge (ETUC) | Demography and the labour market: a challenge for the unions 2007 | Assessing the results of social dialogue in age management; driving forward the mindsets of employees, employers, trade union organisations and the public authorities notably with regard to the opportunities to establish quality demographic policies: the quality of the involvement in the workplace, the quality of work through a person’s active life, the possibility of choosing to extend active working life. | ETUC member organisations (as well as public and private stakeholders) |
| Equality | EES EQUAL Community initiative (2001-2003 / 2004-2007) | Developing new ways of approaching age management and supporting intergenerational learning to balance the workplace, in the view of a multidimensional approach towards age; gender equality and balance of working and private life | ESF beneficiaries, organised in transnational development partnership |
| Education | EES LLL programme Education and training 2010 EQUAL | Investment in human capital Validation of formal and non-formal skills acquired in the course of the working life, in order to foster mutual recognition among generations. | Member States |
| Fight against discrimination | Employment Equality Directive 2000/78/EC | Hard law rules in order to prevent and fight unjustified forms of age discrimination in employment preventing certain age groups from fully participating in the labour market; establishment of a general framework for equality in employment, occupation and vocational training. | Member States |

Through the analysis of all these linked and complementary policy practices, it is possible to draw some conclusions with regards to the paths that are followed at European level in order to foster social cohesion within an intergenerational perspective. Having regard to the intergenerational approach, *observing these policies from a wide angle, considering them as a whole*, it is possible to recognise that their attitude is definitely in the sense of realising social cohesion through the conciliation of the exigencies of the different generations at work. It is possible to ascertain the strong connection between the economic and social objectives, and the fact that social cohesion definitely relies on an intergenerational approach. From the most

general and *directive* policy to the most specific one, the European policy making in the theme of employment shows that it is not possible to ignore the demographic change and that the challenge has to be transformed into *opportunity* for all the generations. And indeed, at the most general level, increasing employment for all the members of the society, even through targeted policies, means to provide *social recognition* for all the subjects, for workers of all age groups, regardless of their age and gender. The fight against youth and female unemployment, as well as the promotion of active ageing, mean *decreasing intergenerational tensions* for example ensuring sustainable responsible social protection systems. And the EU strategies aim not only at *more* jobs, but also at *better* ones, always in the view of the demographic situation, which involves increasing chances of social recognition for workers and more social cohesion. Within the EU strategies, it means promoting the *right* employment situation for younger, older and female, through a responsible flexibility able to ensure everyone that work will be conciliated with the personal needs and the life-cycle exigencies. For all these intergenerational objectives, *investing in human capital*, again at every age and for any gender, represent *the way to adapt* workforce to the needs of the changing demands of economy and labour market. But not only. Adaptability, reached through a continuous education process along the working life, also ensures workers to find a working place that better suits their own personal needs, in a perspective of humanisation of work, and provide them an active place within the society, contributing to the general growth and cohesion.

Considering all the European level policies as a whole, therefore, is necessary not only because they are strictly interconnected and linked, but also because this is the only way to correctly appreciate the overall intergenerational purposes they foster, in the view of a better social cohesion.

4. Generational aspects in the overall framework for economic growth, employment and social development

References to the issue of «generations at work» have been found within the overall framework fixed at European level in the view of ensuring economic growth, employment and social development. The high level policies to which we refer are the European Employment Strategy, adapted as functional to the objectives fixed in the Lisbon Strategy, and, more in particular, the Integrated Guidelines for Employment fixed for the period 2005-2008. Of course, our aim is not to provide a general overview of these broad policies, as they concern the economy and the global development of the internal market, and the whole EU strategy for growth of employment. We have tried to underline the points that may involve a generational approach in the field of employment within these broad policies.

A previous remark regards the fact that reference to the *intergenerational* perspective is outstanding in an overall sight, looking at the policies fixed here as a whole. On the one hand, specific references are made, in particular to active ageing and the increasing of the permanence at work of the older workers (in the Lisbon Strategy in particular); on the other hand, concerns of the European youth are taken into account separately, in particular with the European Youth Pact of 2005 and the following strengthening actions. Nevertheless, the approach adopted by the European Councils and the European Commission actually show the effort to address issues and actions concerning employment in the view of the integration of both the age groups within the labour market strategies, keeping into consideration also the gender perspective. An example of this generational integrated view is the policy approach to

the social protection issue, treated not only as an economic matter but also as a ground where to ensure solidarity between generations.

Furthermore, it has to be bared in mind that the ones described herein under do not represent different policy practices. Indeed, the Lisbon Strategy, the European Employment Strategy and the Employment Guidelines, as well as the Active ageing and Youth employment policies, and together with the aspects connected to transversal issue of social protection, represent developments within a common policy line with regard employment and social cohesion at European level. Their common description responds to the interconnection among them, which characterises the EU level policy making, in a complex but at the same time integrated way. The effort made here has been in the sense to scan the policy guidelines and documents to the aim to individuate the generational, and where possible, intergenerational aspects within the broader context.

4.1 General presentation

4.1.1 Lisbon Strategy

When the European Council met in Lisbon, Portugal, in March 2000, EU leaders adopted a ten-year programme aimed at revitalising growth and sustainable development across the EU. They noted the challenges Europe was facing from globalisation, an *ageing population*, and the emergence of a worldwide information society. They resolved that economic and social reforms had to take place in the context of “a positive strategy which combines competitiveness and social cohesion”, and reaffirmed that the European social model, with its developed systems of social protection, must underpin the strategy. The Union “set itself a new strategic goal for the next decade: to become the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion”. This was to be achieved through a range of policies including a sound macroeconomic policy mix that is conducive to high growth, completing the internal market, but also *investing in people* and combating social exclusion: in particular, EU leaders pledged to aim for full employment in Europe, in a society accommodating the personal choices of women and men.

The 2000 **Lisbon Strategy** sets specific targets: an annual economic growth around 3%, and an overall employment rate of 70% by 2010, to be specifically realised by increasing the *participation* to the labour market of *women* and *older workers*. Therefore, specific aims regard an employment rate for women of over 60%, and an employment rate of 50% among older workers by 2010.

By the mid-term in 2005, it was clear that results were not as good as expected and that the EU would have had great difficulty in reaching the Lisbon goals. At the 2005 Spring European Council meeting, EU leaders carried out a review of progress, and the Commission published the Communication “Working together for growth and jobs: a new start for the Lisbon Strategy”¹⁹ which focused on the necessity to implement the entrance of young people in the labour market, and the retaining of the older ones through active ageing policies. The gender and family conciliation perspective was of first importance too, as the female employment rate was still too low with respect to the objectives of full employment. The

19. http://ec.europa.eu/growthandjobs/pdf/COM2005_024_en.pdf

Brussels European Council of March 2006 in particular stresses that in view of the demographic change in the European Union employment rates have to be increased and the reconciliation of work and family life has to be promoted.

To tackle these demographic and employment challenges, it was found to be necessary to support policies that make it possible to combine working life with children and family life, equal opportunities, to promote solidarity between the generations, promote health, improve affordable care for children and other people in need of care, life-long learning and an increased employment rate of young people, older workers and disadvantaged groups.

A strategy which can be considered as common to all age groups and generations within the Lisbon goals has been undertaken with regards to *education and training for living and working in the knowledge society*. “People are Europe's main asset and should be the focal point of the Union's policies. Investing in people and developing an active and dynamic welfare state will be crucial both to Europe's place in the knowledge economy and for ensuring that the emergence of this new economy does not compound the existing social problems of unemployment, social exclusion and poverty. Europe's education and training systems need to adapt both to the demands of the knowledge society and to the need for an improved level and quality of employment. *They will have to offer learning and training opportunities tailored to target groups at different stages of their lives: young people, unemployed adults and those in employment who are at risk of seeing their skills overtaken by rapid change*”.

4.1.2 European Employment Strategy

The **European Employment Strategy** represents the policy line through which the objectives of the Lisbon Strategy are pursued. It was already launched in November 1997 by the Luxembourg Jobs Summit, against a backdrop of high unemployment. This paved the way for Member States and the Commission, through cooperation and sharing of experiences, to reach common targets and objectives for more and better jobs in Europe. After the launch of the Lisbon Strategy in 2000, the focus of the EES shifted from reducing unemployment to regaining the conditions for full employment. In 2005, the European Council and Commission agreed that the Lisbon Strategy needed to be amended and centred on growth and jobs. Refocusing Lisbon brought about the need for more and better jobs. As a result the EES came into the very heart of European policy priorities. It has been the model for several open methods of coordination including social protection and education and training, but above all it has achieved concrete results at the forefront of European citizens' concerns. Since 1997, the employment rates of older workers, women, as well as the overall rates, have risen substantially while both unemployment and long-term unemployment rates have fallen significantly (the latter by about a third). Member States can better enact their employment policies and learn from each other how to achieve common targets.

The EES is articulated in four thematic pillars, namely

Employability

- a) Facilitating access and return to the labour market for those who have difficulty in being integrated or re-integrated into a labour market which must be open to all
- b) Combating racism and xenophobia in relation to the labour market

Entrepreneurship

- c) Opening up the business creation process to all by providing the tools required for setting up in business and for the identification and exploitation of new possibilities for creating employment in urban and rural areas
- d) Strengthening the social economy (the third sector), in particular the services of interest to the community, with a focus on improving the quality of jobs

Adaptability

- e) Promoting lifelong learning and inclusive work practices which encourage the recruitment and retention of those suffering discrimination and inequality in connection with the labour market
- f) Supporting the adaptability of firms and employees to structural economic change and the use of information technology and other new technologies

Equal Opportunities for women and men

- g) Reconciling family and professional life, as well as the re-integration of men and women who have left the labour market, by developing more flexible and effective forms of work organisation and support services
- h) Reducing gender gaps and supporting job desegregation.

Certain thematic fields, can clearly interest the intergenerational dimensions of age groups at work, and are capable to be translated in actions and specific initiatives, which may foster social cohesion under this perspective. This has happened, for example, with regards to the Community initiatives EQUAL, as far the objectives of the activities funded through it have to be reconducted to the thematic fields of the EES.

And indeed, facilitating access and return to the labour market for those who have difficulty in being integrated or re-integrated into a labour market, improving the quality of jobs, promoting lifelong learning and inclusive work practices which encourage the recruitment and retention of workers, supporting the adaptability of firms and employees to structural economic change and the reference to equal opportunities with regards to female participation to the labour market, are the most common grounds on which policies and activities have been developed in the view of a better integration of and between generations at work.

The development of the EES is realised, at the level on Member States, through the policy instrument represented by the integrated guidelines for Employment, which fix those, which are meant to be the priorities for the implementation of the Lisbon Strategy and the European Employment Strategy.

In a more age group targeted perspective, policy instruments have been developed by the European Commission in accordance with the Council, in the sense of promoting active ageing, in the view of retaining older workers longer on the labour market, and initiatives for European Youth, aimed at reducing youth unemployment.

4.2 Type of initiator

As already mentioned above, the initiators of the high level policy making are the European Council, composed by the Heads of Governments, and in particular the Employment Council, which are more specifically composed by the Ministers of employment and social affairs of the Member States. At the European level, the Commission and European Council also work closely together to ensure that the Lisbon Strategy for Growth and Jobs benefits from a coordinated approach. The Commission ensures, through its role in driving forward the Community Lisbon Programme, that policy making and funding activities at European level best serve the goals of growth and jobs. In particular the role of the Commission is to provide more specific responses in line with the overall objectives; address Communications, reports and other policy acts in which it specifies certain themes within the overall frame; consult the European level stakeholders, from the social partners to the civil society organisations, coordinating their interventions, and, above all, keeping them into consideration for the drafting of the policies; assist, monitor and assess the national level reform process.

With more specific regards to the Guidelines for Employment, the Commission proposes the Integrated Guidelines for reform, which are then approved by the Council and form the broad basis for Member States' National Reform Programmes. The Commission not only plays a central role in the assessment of the progresses made by the Member States in implementing the EES. It works continuously with Member States to help them exchange experience, learn from each other and implement, update, and improve their National Reform Programmes, taking into account the strengths and weaknesses identified in the Annual Progress Report.

4.3 Target groups

With regards to the implementation of the EES and in particular of the employment guidelines, the Member States are called at enacting the EU priorities in their national employment plans, through the 'open method of co-ordination', based on five key principles: subsidiarity (balance between European Union level and the Member States), convergence (concerted action), mutual learning (exchanging of good practice), integrated approach (structural reforms also extend to social, educational, tax, enterprise and regional policies) and management by objectives.

For their policy tools, as communications, reports and other policy act endorsed mostly by the European Commission, the addressees are not only the Member States, which are anyway called to keep the policies into account, but also EU level actors, social partners at European and national level, companies, organisations of the civil society, all those subjects who are directly or not involved in employment and social matters and who are able to bring proactive contributions to the debate and the implementation of the objectives.

4.4 Tools

The implementation of the Lisbon Strategy and EES goals is realised, at European level, through a series of policy instruments that are more or less general in their scopes, and are normally addressed to the Member states and the other stakeholders both on the European and the national level. With specific regards to the EES, we are going to present the Guidelines for employment, and other more age-group targeted policies connected to active ageing and youth initiatives. We will also present some specific remarks connected to the issue of social protection intended as an intergenerational matter.

4.4.1 Guidelines for employment

Implementation of the overall strategic goals will be facilitated by applying a new *open method of coordination* as the means of spreading best practice and achieving greater convergence towards the main EU goals. This method, which is designed to help Member States to progressively develop their own policies, involves first of all fixing guidelines for the Union combined with specific timetables for achieving the goals which they set in the short, medium and long terms. The **Guidelines for employment**, which are nowadays *integrated* in a single, coherent and simplified text, together with the Broad Economy Policy Guidelines (BEPGs), represent the principal policy instrument for developing and implementing the Lisbon Strategy, the direct common point of reference for the national governments in the harmonisation of their internal policy plans in line with the priorities fixed at EU level.

It has to be mentioned the particular nature of the Guidelines as *policy tools*: they draw directions addressed to the member states, and are themselves policy instruments. Their functionality as policy tools is remarkable in the view of the three-years reporting cycle, established as a way to assess the effective implementation and developments of the European Employment Strategy. This reporting period is fixed from 2005 to 2008, with the Employment guidelines still in force, revisable, following the Commission proposals, for the period 2008-2010.

The generational approach is revisable in some of them more than in others.

The guideline number 17 (first one regarding employment) contains the Commission proposal to:

Implement employment policies intended to achieve full employment, improve quality and productivity at work, and strengthen social and territorial cohesion. These policies should help to achieve an average employment rate for the European Union (EU) of 70% overall, at least 60% for women and 50% for older workers (55 to 64), and to reduce unemployment and inactivity. Member States should set national employment rate targets.

The Commission is quite clear in stating that, in addressing these objectives, action should concentrate on attracting and retaining more people in employment, increase labour supply and modernise social protection systems; improving adaptability of workers and enterprises; increase investment in human capital through better education and skills. Promoting an increased labour supply in all groups, a new life-cycle approach to work and modernising social protection systems to ensure their adequacy, financial sustainability and responsiveness to changing needs in society are all the more necessary because of the expected decline in the working-age population. In particular, the qualitative research carried out at national level has underlines the topic of the social protection as a possible ground of tensions between the young and the older generations, whereas the young feel that they are financing the pensions of the old ones, in the view of a social protection that will not be so generous when they will be old aged. And it is not a random case that this guideline is meant to be implemented also in the view of integrated guideline ‘To safeguard economic and fiscal sustainability’ (No 2). Special attention has to be paid to tackling the persistent employment gaps between women and men, and the low employment rates of older workers and young people, as part of a new intergenerational approach. The right conditions must be put in place to facilitate progress in employment, whether it is first-time entry, a move back to employment after a break or the

wish to prolong working lives. The quality of jobs, including pay and benefits, working conditions, employment security, access to lifelong learning and career prospects, is crucial, as are support and incentives stemming from social protection systems.

Also guideline number 18 presents a remarkable generational approach.

Promote a life-cycle approach to work, through:

- *a renewed endeavour to build employment pathways for young people and reduce youth unemployment, as called for in the European Youth Pact;*
- *resolute action to increase female participation and reduce gender gaps in employment, unemployment and pay;*
- *better reconciliation of work and private life and the provision of accessible and affordable childcare facilities and care for other dependants;*
- *support for active ageing, including appropriate working conditions, improved (occupational) health status and adequate incentives to work and discouragement of early retirement;*
- *modern social protection systems, including pensions and healthcare, ensuring their social adequacy, financial sustainability and responsiveness to changing needs, so as to support participation and better retention in employment and longer working lives.*

As already mentioned above, and as it will be more specifically reported hereinafter, the references to youth, older workers and to the necessity to reconcile work and private life are primary generational aspects that have been specifically treated by the Commission, and that, as for the most of the goals set in the guidelines, find also a financial support at European level within the European Social Fund and other Community initiatives as EQUAL. What is remarkable here is that the reference to these intergenerational aspects is specifically addressed to the governments of the Member States, in order to mainstream these issues within their occupational plans.

In the view of improving adaptability of workers and enterprises, the Commission remarks that Europe needs to improve its capacity to anticipate, trigger and absorb economic and social change, *in primis* the one connected to the demographic challenge. This requires employment-friendly labour costs, and, - what can be read as more related to the generational approach to work - modern forms of work organisation and well-functioning labour markets allowing more flexibility combined with employment security to meet the needs of companies and workers. This should also contribute to preventing the emergence of segmented labour markets. In today's increasingly global economy with market opening and the continual introduction of new technologies, both enterprises and workers are confronted with the need, and indeed the opportunity, to adapt. While this process of structural changes is overall beneficial to growth and employment, it also brings about transformations, which are disruptive to some workers and enterprises. Enterprises must become more flexible to respond to sudden changes in demand for their goods and services, adapt to new technologies and be in a position to innovate constantly in order to remain competitive. They must also respond to the increasing demand for job quality which is related to *workers' personal preferences and family changes*, and they will have to cope with an *ageing workforce and fewer young*

recruits. On the other hand, also for workers working life is becoming more complex as working patterns become more diverse and irregular and an increasing number of transitions need to be managed successfully throughout the life cycle. With rapidly changing economies and attendant restructuring, they must cope with new ways of working, including enhanced exploitation of information and communication technologies (ICT) and changes in their working status, and be prepared for lifelong learning. In the picture designed this way by the European Commission itself, therefore the Guideline 21 can definitely be read in the light of the generational perspective, and in the adaptation to the labour market of the different exigencies of different age group of workers.

Promote flexibility combined with employment security and reduce labour market segmentation, having due regard to the role of the social partners, through:

- *the adaptation of employment legislation, reviewing where necessary the different contractual and working time arrangements;*
- *addressing the issue of undeclared work;*
- *better anticipation and positive management of change, including economic restructuring, notably changes linked to trade opening, so as to minimise their social costs and facilitate adaptation;*
- *the promotion and dissemination of innovative and adaptable forms of work organisation, with a view to improving quality and productivity at work, including health and safety;*
- *support for transitions in occupational status, including training, self-employment, business creation and geographic mobility.*

As mentioned above, increasing investment in human capital through better education and skills is one of the paths through which the Lisbon Strategy and the EES mean to achieve their goals. The employment guideline keep into account this need to invest more in human capital. This can be a useful way to better conciliate age and working life, ensuring a major adaptability and integration. Too many people fail to enter or to remain in the labour market because of a lack of skills, or due to skills mismatches. Knowledge-based and service-based economies require different skills from traditional industries; skills which also constantly need updating in the face of technological change and innovation. Workers, if they are to remain and progress in work, need to accumulate and renew skills regularly. The productivity of enterprises is dependent on building and maintaining a workforce that can adapt to change. Governments need to ensure that educational attainment levels are improved and that young people are equipped with the necessary key competences, in line with the European Youth Pact. All stakeholders should be mobilised to develop and foster a true culture of lifelong learning from the earliest age. To enhance access to employment *for all ages*, raise productivity levels and quality at work, the EU needs higher and more effective investment in human capital and lifelong learning for the benefit of individuals, enterprises, the economy and society. Member States should make better use of the Structural Funds and the European Investment Bank for investment in education and training. To achieve these aims, Member States commit themselves to establishing comprehensive lifelong learning strategies and implementing the education and training 2010 work programme. This is what the implementation of guideline 23 involves:

Expand and improve investment in human capital, through:

- *inclusive education and training policies and action to facilitate significantly access to initial vocational, secondary and higher education, including apprenticeships and entrepreneurship training;*
- *significantly reducing the number of early school leavers;*
- *efficient lifelong learning strategies open to all in schools, businesses, public authorities and households according to European agreements, including appropriate incentives and cost-sharing mechanisms, with a view to enhancing participation in continuous and workplace training throughout the life cycle, especially for the low-skilled and older workers.*

Setting ambitious objectives and increasing the level of investment by all actors is not enough. To ensure that supply meets demand in practice, lifelong learning systems must be affordable, accessible and responsive to changing needs. Adaptation and capacity building of education and training systems is necessary to improve their labour market relevance, their responsiveness to the needs of the knowledge-based economy and society and their efficiency. ICT can be used to improve access to learning and better tailor it to the needs of employers and employees. Greater mobility for both work and learning purposes is also needed to access job opportunities more widely in the EU at large. The remaining obstacles to mobility within the European labour market should be lifted, in particular those relating to the *recognition and transparency of qualifications and competences*. It will be important to make use of the agreed European instruments and references to support reforms of national education and training systems, as is laid down in the education and training 2010 work programme. Guideline 24 states as follows:

Adapt education and training systems in response to new competence requirements, by:

- *raising and ensuring the attractiveness, openness and quality standards of education and training, broadening the supply of education and training opportunities and ensuring flexible learning pathways, and enlarging possibilities for mobility for students and trainees;*
- *easing and diversifying access for all to education and training and to knowledge by means of working time organisation, family support services, vocational guidance and, if appropriate, new forms of cost-sharing;*
- *responding to new occupational needs, key competences and future skill requirements by improving the definition and transparency of qualifications, their effective recognition and the validation of non-formal and informal learning.*

At policy level, within the EES, several interventions of the Council and the Commission have been developed, which more specifically regard employment with regards to different age groups. It is in strict connection with the EES that the Youth Pact and its implementation of 2005 have been drawn, as well as the Communication on European policies concerning Youth, addressing the concerns of young people in Europe, aimed at the implementation of the European Youth Pact itself; the Communication on Promoting young people's full participation in education, employment and society; the Report on labour participation and

Active ageing²⁰. In a more intergenerational perspective, we will also mention here more specifically the EU approach to the issue of social protection. This offers an interesting integrated view of what represents a complement of the age-targeted strategies in the light of an increased solidarity between generations.

Again as for the employment guidelines, we report hereinafter the presentation of these policy instruments which have been designed in order to specify the Lisbon goals and address Member States, but also European and national actors in better targeting the necessary actions.

4.4.2 Active ageing

The impact of workforce ageing on employment and the labour market is an increasingly important theme in Europe's employment strategy and has been on the agenda for some time. The 1994 EU Summit was the first to identify the need to improve employment opportunities for older workers. The 1995 Council Resolution on the employment of older workers called on the European Commission to organise an exchange of information, experience and good practices concerning the employment of older workers. Both the Cardiff (1998) and Vienna (1998) European Councils emphasised the need to pay special attention to older workers as part of the priority to develop a *skilled* and *adaptable* workforce. The issue was added to the 2001 Employment Guidelines (European Commission, 2001) and was also a point of discussion of high priority during the Barcelona European Council in 2002. In March 2001, the European Council of Stockholm defined a quantitative and ambitious target: it determined that, by 2010, the employment rate of older workers (those aged 55–64 years) should be 50% (it was 26.3% in 2000) (European Council, 2001). The Council's target was in addition to the overarching strategic goals set at the Lisbon European Council. The Barcelona European Council emphasised *that responsibility for tackling issues arising from an ageing population will need to be shared between the generations*: 'A progressive increase of about five years in the effective average age at which people stop working in the European Union should be sought by 2010' (European Council, 2002).

More recently, the issue of improving the employment prospects of older workers was tackled again under the heading of 'active ageing' by a special report of the European Commission, *Increasing labour force participation and promoting active ageing*²¹. Active ageing is regarded as being at the centre of EU policy on tackling issues associated with the ageing of European society. The strategies to be adopted are in the sense of a dynamic, life cycle approach, which tends to maximise each person's capacity, also through preventing the erosion of skills throughout adult working life and providing higher and adaptable skills; improving quality in work to provide a safe, attractive and adaptable work environment in order to persuade older people to participate in the labour market over his or her whole life cycle.

The terms denoted an increase in the labour force participation of older workers as well as the promotion of productive activities in the life phase of retirement, such as the involvement of citizens in and commitment to matters of society.

20. The key document of the EES are available on line
http://ec.europa.eu/employment_social/employment_strategy/key_en.htm

21. <http://register.consilium.eu.int/pdf/en/02/st06/06707en2.pdf>

The prolongation of working life is not only regarded as an important instrument to sustain pension systems but also as a decisive answer to the anticipated demographically induced labour shortages and the changing age composition of the labour force in many EU countries. In this context, the key message of the Commission's report on increasing labour force participation and promoting active ageing is an explicit call for a dynamic life-course perspective: "The objective of a comprehensive strategy should be to maximise each individual's capacity to participate over his or her whole life cycle. ... Prevention is the key to a successful integration and retention of people in the labour market. The aim is to ensure the positive interaction of economic, employment and social policies with the view to supporting a long-term sustainable working life in which all human resources in society are fully utilised. (...) High employment and activity rates among the prime age group could be translated into significantly higher employment rates for older workers up to a later decade if a dynamic approach is taken to retain these workers longer in the labour market through better working arrangements and quality in work".

Meanwhile, requirements have been stipulated at EU policy level in the Employment Guidelines 2003, specifically Guideline 5: 'Increase labour supply and promote active ageing' (European Council, 2003). The Employment Guidelines emphasised that action is needed at all levels and by all social actors to promote opportunities for the ageing workforce. At the same time, they call for preventive and active approaches in order to meet the challenge of a changing economy and labour market. Furthermore, the revised European Employment Strategy considers as a priority the need to delay retirement through policies that promote active ageing (European Commission, 2003). More recently, the European Commission assessed progress towards the Stockholm and Barcelona targets in its communication *Increasing employment of older workers and delaying the exit from the labour market*, and judged it insufficient (European Commission, 2003). The Commission identified several Member States that needed to make particular efforts, having made slow progress in relation to both targets: Austria, Belgium, France, Germany, Greece and Italy. This requirement has been endorsed by the 2003 report of the Employment Taskforce, which argued that a radical policy shift away from early retirement is necessary and that the challenge is not only to ensure that a higher proportion of those currently aged 55–64 years stay in work, but also to enhance the employability of those currently aged in their 40s and 50s. The EU has committed itself to supporting this development through policy coordination, exchange of experience and of best practice, and through financial instruments.

In its synthesis report to the 2004 European Spring Council, the European Commission identified active ageing as one of the three core priority areas for which swift action is needed if the goals of the Lisbon strategy are to be realised. The Commission called upon the social partners to dedicate themselves to designing and implementing comprehensive active ageing practices in workplaces and in labour markets. The conclusions of the 2005 Spring Council again underlined the importance of extending working life and of initiating active ageing strategies. Effective action to improve the employment conditions of older workers involves government policies at different levels, the social partners and social dialogue, organisations and companies and, of course, older workers themselves: "With a view to making it more attractive for older workers to stay employed for longer, the European Council underlines that active ageing strategies should be implemented. In this context, incentives for prolonging working lives, gradual retirement, part-time work, improving quality at work and targeted

incentives to ensure that the number of older workers participating in training rises faster than that for the overall workforce should be considered”²².

In this sense, Member States in particular are called to update and revise their occupational plans: parties concerned, first and foremost national, are also regional and local organisations. Not only, also the social partners at European as at national level, are called at supporting the active ageing policies with targeted actions which could be enacted at the levels of concertation, collective bargaining, companies.

4.4.3 European Youth Pact

A return to sustained and sustainable growth requires greater demographic dynamism, improved social and vocational integration and fuller utilisation of the human potential embodied by European youth. To this end, the European Council has adopted the European **Youth Pact** of 2005, as one of the instruments contributing to the achievement of the Lisbon objectives. Against the background of Europe's ageing population, the European Council sees a need for young Europeans to benefit from a set of policies and measures forming a fully integrated part of the Lisbon Strategy. The Youth Pact aims to improve the education, training, mobility, vocational integration and social inclusion of young Europeans, while facilitating the reconciliation of working life and family life. The Pact should ensure the overall consistency of initiatives in these areas and provide the starting point for strong, ongoing mobilisation on behalf of young people. Its success depends on the involvement of all parties concerned, first and foremost national, regional and local youth organisations as well as the European Youth Forum, regional and local authorities and the social partners.

The European Council²³ calls on the Union and Member States, each within the limits of its own powers and in particular under the European employment strategy and under social inclusion strategy, to draw upon the following lines of action:

Employment, integration and social advancement

- specifically monitoring policies for the sustained integration of young people into the labour market, in the context of the mutual learning programme on employment;
- endeavouring to increase employment of young people;
- giving priority under national social inclusion policy to improving the situation of the most vulnerable young people, particularly those in poverty, and to initiatives to prevent educational failure;
- inviting employers and businesses to display social responsibility in the area of vocational integration of young people;
- encouraging young people to develop entrepreneurship and promoting the emergence of young entrepreneurs.

22. among others, 2006 Brussels European Council, on line
http://www.consilium.europa.eu/ueDocs/cms_Data/docs/pressData/en/ec/89013.pdf

23. Presidency Conclusions – Brussels, 22/23 March 2005, 7619/05

Education, training and mobility

- ensuring that knowledge matches the needs of a knowledge-based economy and, to this end, encouraging the development of a common set of core skills; in this context, concentrating primarily on the problem of drop-outs from the school system;
- expanding the scope for students to undertake a period of study in another Member State;
- encouraging mobility of young people by removing obstacles for trainees, volunteers and workers and for their families,
- for researchers, stepping up ongoing initiatives under the Marie Curie programme;
- developing, between Member States, closer cooperation on transparency and comparability of occupational qualifications and recognition of non-formal and informal education.

Reconciliation of working life and family life

- promoting the reconciliation of working life and family life by sharing the responsibility between partners, particularly by expanding the child care network and developing innovative forms of work organisation;
- considering child-friendly policies, in the light of discussions on the Commission Green Paper on demographic change.

More recently a new boost to the youth policies aimed at its integration in the labour market has been given by the Commission²⁴. While overall conditions for young people in Europe today are positive – freedom and security, prosperity, longer life expectancy –, there is increasing concern that many of them cannot prosper. High rates of child poverty, poor health, school dropout and unemployment among a too large number of young people, indicate a need to review the investments Europe is making in its youth starting earlier, also taking into account the essential role of families. Social exclusion of young people carries high social and economic costs and needs to be prevented. The challenges young people are facing today are complex and diverse. There are more opportunities to learn and participate but less established pathways. Maintaining growth and prosperity in Europe, whilst promoting social cohesion and sustainable development, depends on a full contribution and participation by all young people, all the more so since their number relative to the population as a whole is shrinking. Young people will have to bear the growing cost of an ageing population, which calls for an intergenerational response.

4.4.4 Intergenerational perspectives connected to social protection

A transversal issue treated within the Lisbon strategy and the Employment guidelines deserves some remarks in a critical perspective. The issue in question is the one regarding **social protection**. In the previous description of the policy practices it has been mentioned as a part of the overall strategies to reform the labour market legislations within the different Member States, in the light of the demographic change. And indeed it represent a point on the European social agenda, as developing and ensuring equal and above all sustainable social protection systems has become a necessity. Ensuring their adequacy, financial sustainability

24. COM(2007) 498 final, Promoting young people's full participation in education, employment and society, on line http://ec.europa.eu/employment_social/employment_strategy/pdf/youthcom_2007_en.pdf

and responsiveness to changing needs in society are all the more necessary because of the expected decline in the working-age population. Equitable spreading of the costs of ageing between active persons and older workers and pensioners are one of the most important challenges in an ageing society, which are closely linked to solidarity aspects between generations. In particular, the qualitative research carried out at national level has underlined the topic of the social protection as a possible ground of tensions between the young and the older generations, whereas the young workers feel that they are financing the pensions of the old ones with their work, and that, on the other hand, they are not confident in the fact that the pension systems will be so generous when they will be old aged. And in fact the European strategies to face the phenomenon of the demographic ageing are committed in ensuring that, through the open method of coordination, the Member States undertake appropriate reforms of pension systems in order to contain pressures on pensions sustainability, to place pension systems on a sound financial footing and ensure *a fair intergenerational balance*. In fact, the burden of projected increases in pension expenditure has to be shared among different appropriate instruments (contributions, taxes and reserve funds); otherwise the problem will be postponed for future generations through increased borrowing and consequent economic decline. The European level strategies are therefore aimed at ensuring that pension provisions and reforms maintain a fair balance between the active and the retired by not overburdening the former and by maintaining adequate pensions for the latter. The main strategy consist in raising employment rates of older workers, and of the part of the population that for several reasons is still often excluded: women. In particular, retaining older workers on the labour market as much as possible represents an important feature.

Anyway, retaining older workers in the labour market and increasing the employment rates in a view of a major economic growth and for the specific aim to ensure sustainable and fairly balanced social protection systems between generations involve more than one specific measure and requires the integrated implementation of several policies provided in the framework of the Lisbon strategy, of the EES and the Guidelines for employment (see in particular guidelines number 17 and 18).

First of all an equality problem is involved. The intergenerational perspective applied to the issue of social protection, as for all the policies treated here, should keep into consideration the *gender dimension*. This is valid *a fortiori* when the growth of the overall employment rates so strongly depends on the involvement of women who are still excluded from the labour market for several reasons, connected to traditional approach to the family duties and to a general segregation in career patterns and situations in which the skill growth is not provided. The solutions can be reconducted to the guidelines, which specifically provides reconciliation between work and family life, but not only. Another issue connected to the retention of older workers at work involves the work humanisation problem: the conditions for extending the working lives of older workers have to be created through the creation of appropriate jobs design and work organisation, offering workers greater scope for individual decision making and control and protection for excessive demands, in the view of a life-cycle approach to work. The connection with the issue of flexibility can offer in this sense useful and proactive paths. Also the skill and qualification problems can find solutions in the light of the investment in human capital and in an approach to life long learning more targeted to the exigencies of the older. This last feature can indeed also present an useful approach to the problem of the motivation to remain at work that many older workers, especially low skilled, or not recognised in their competencies, may face.

4.5 Duration of the action

The Lisbon Strategy has been set in its objectives until 2010, The European Employment Strategy and the Guidelines for employment respond to a three years period of duration, being relaunched, every time, on proposal of the Commission. Also the active ageing and youth initiatives, connected as they are to the Lisbon Strategy, are supposed to last, designed this way, for the period, which arrives to 2010. The different aspects of these policies, anyway, are also regulated under different headings, which might respond to other calendars. In the case of the lifelong learning programme Education and training 2010, which has been launched in connection with the EES, the duration of the actions is set until 2010.

4.6 Feedback

With regards to the implementation of the Guidelines for Employment, the open method of coordination adopted to enact the guidelines involves a reporting process every three years in which each Member State draws up a programme in which is described how these Guidelines are going to be designed and implemented nationally, the National Reform Programmes²⁵. The implementation is afterwards reported in the Joint Employment Report, the Employment chapter of the EU Annual Progress Report, drawn by the Commission and adopted by the Council. In its Annual Progress Report the Commission assesses the content and implementation so far of National Reform Programmes, allowing stakeholders and citizens to see how far each Member State has got. The Council may decide, by qualified majority, to issue country-specific Recommendations upon a proposal by the Commission. The Commission reviews progress made at both national and Community levels based on regular monitoring and on evaluation of the implementation of the Member states national programmes.

The strategy uses quantified measurements, targets and benchmarks, to allow for a proper monitoring and evaluation of progress. In this context, indicators are used to assess the performance and efforts by Member States in the field of employment policies and are a support for the analysis of the National Reform Programmes and in the EU annual progress report, which will integrate the Joint Employment Report.

The indicators are agreed in the Employment Committee (EMCO) on an annual basis. The Employment Committee's working group on Indicators assists EMCO on the selection and development of indicators required to monitor the Employment Guidelines. The Commission and the Member States work together in this Indicators group. Work is going on within the group to improve the comparability, reliability and timeliness of databases.

The assessment of the implementation of the employment guidelines, as for the EU annual progress report drawn by the Commission for the year 2007 and the Joint Employment report 2007/2008²⁶, remarks a situation, which is not satisfying yet. Europe must continue labour market reforms for more and better jobs. People not working and in precarious work need special attention. An ageing Europe in an intensely competitive world needs more people working more productively.

25. http://ec.europa.eu/growthandjobs/national-dimension/member-states-autumn-2007-reports/index_en.htm

26. <http://register.consilium.europa.eu/pdf/en/08/st07/st07169.en08.pdf>

With regards to the **youth situation**, only about half of the Member States have seen an improvement in youth unemployment between 2000 and 2006. There are still 17.5% of young men and 13.2 % of young women leaving school with at most a lower secondary education. Only six Member States have reached the target of no more than 10%. Despite the relatively favourable labour market outlook, a number of serious concerns persist. Most pressing, youth unemployment continues to be a severe problem in many Member States and young people have not benefited proportionately from the economic upswing; in 2006 they still remained exposed to unemployment more than twice as much as the overall work force. Today nearly one in six young people in the EU, almost 7 million, still leave the education system prematurely and there has been virtually no increase in levels of educational attainment. Finally, many Member States still fall short of the new activation targets. Despite also being a Lisbon priority since 2006, and given the importance of the young generations in addressing the future demographic challenges, these trends remain disappointing.

Despite relatively poor results, increased efforts to fight youth unemployment are reported by many countries. Policy measures are pursued along 4 axes: Firstly, through improved vocational education and training pathways (AT, BE, LU, EE), specific guidance and pathways for at-risk school leavers (BE, FR, DE, LU, SI) and specific contract schemes with a training component (LU). Secondly, through intensified and personalised guidance and job-search support (PT) and creation of employment pathways (MT). Thirdly, through reduction of employers' social security contributions (BE, ES, HU, SE), tax promotion for apprenticeship places (AT, FR), wage support for recruitment of long-term unemployed (DE). Fourthly, through strengthening the conditionality of social or unemployment benefits (CZ) and reduced taxation of students' jobs (FR). At the 2006 Spring European Council Member States agreed that they should provide a "new start" for the young unemployed within 6 months by 2007 and 4 months by 2010. According to the most recent EU data, only 15 countries manage to have a timely new start offered to at least two thirds of young unemployed. In a small lead group of countries nearly all young unemployed are offered a new start during their first months of unemployment (AT, FI, SE). Seven countries have reached a 80-90 % coverage (BE, FR, DE, IE, LT, NL, ES) while 4 countries only provide a 70-80% coverage (HU, LV, LU, PT).

Older workers still represent one of the largest target groups for raising **employment**. With an employment rate of 43.5% by the end of 2006, (6.5 pp from the 2010 target), there is still significant untapped potential among older workers and their numbers will continue to grow during the coming decades. There has been some recent progress in encouraging *active ageing strategies* especially through restricting eligibility conditions, while compensating for particularly demanding or hazardous jobs, by increasing incentives to work longer for employees (BG, AT, FR, ES, DK, PT), by enhancing work opportunities for older and particularly disabled workers and by improving working conditions and providing opportunities for skills upgrading and retraining. The current average exit age from the labour market (60.9) still remains well below the 2010 target.

The progress in the field of **gender equality** has been mixed. The employment rate for women has increased in almost all Member States reaching 57.2 % in 2006, and stands relatively close to the 2010 target of 60 %, but is still under 50% in 4 Member States (EL, IT, MT and PL). Only some countries (AT, CY, DK, FR, EL, IE, LV, MT, PL, SE, SI) systematically use statistics broken down by sex for reporting on employment. The gender pay gap shows no sign of reduction over the last few years and is still at 15 % overall in the EU. Few countries have taken concrete actions in this field (AT, BE, DK, FI, FR, LU, NL,

SE, SK, UK) and no new targets have been set following the Commission Communication on gender pay gap.

The issue of **reconciliation between work and private life** is gaining some impetus in Member States, mostly through the commitment to improve the provision of childcare facilities (AT, DE, EL, LU, NL, PT, UK). However, many Member States are far from reaching the childcare targets and most do not even refer to them in their national strategies.

With regards to the participation in **life long learning** rates, clear progress has been made in recent years on reducing early school leaving but in 2006, almost 7 million young people still left education prematurely. Progress is too slow in increasing youth educational attainment levels; figures have only improved moderately since 2000. The level of adult participation has remained stable or has even decreased in 20 out of 27 Member States since 2004. Participation levels are particularly low in Southern European countries and in most of the new Member States. The lowest participation rates throughout the EU continue to be those of older workers.

While **investing in human capital** to achieve efficient and equitable outcomes is still a challenge in most Member States, it is imperative that Europe steps up in this sense. Trends show a correlation between employment and participation to lifelong learning. Adequate incentives and cost sharing mechanisms for enterprises, public authorities and individuals must be developed. Total public expenditure on education as a percentage of GDP increased in the EU between 2000 and 2003 from 4.7% to 5.2%, but then decreased again to 5.1% in 2004. Similarly, progress on private expenditure on educational institutions as a percentage of GDP slowed down in 2004. The European Social Fund (ESF) will invest around 34.3 billion EUR in improving human capital and life-long learning systems in the current programming period. Most countries have made progress in defining comprehensive lifelong learning strategies covering all systems and levels of education and training. It is essential that those countries that have not yet adopted a lifelong learning strategy do so urgently. All countries have measures addressing the areas for which EU benchmarks have been set: reducing the number of early school leavers, and improving secondary attainment and increasing adult participation in lifelong learning. , Although most countries have set national quantitative targets (BE, DK, CY, EE, EL, ES, FI, FR, HU, IE, LT, LV, MT, PL, PT, RO, SI, SK) the modest progress visible since 2000 is not sufficient to reach the EU targets set for 2010.

Every sixth young person (15.3%) aged 18-24 in the EU-27 still leaves school with no more than lower secondary education (male: 17.5%, female: 13.2%) and does not participate in any kind of education and training after this. Progress has so far not been sufficient to reach the EU benchmark of 10% by 2010. Several countries (ES, IT, MT, PT) still had very high levels (above 20%) in 2006 and in some countries performance has actually worsened since 2000 (ES, LU, SE, SK). Similarly, there has been some progress in improving upper secondary attainment levels, but not enough to achieve the objective of at least 85% of 22-years-olds to complete at least upper-secondary education by 2010.

Also adult participation in lifelong learning is no longer on track to achieve the EU benchmark of 12.5% by 2010. In 2006, an average of 9.6% of Europeans aged 25-64 was participating in education and training activities (men: 8.8%, women 10.4%), which is slightly less than in 2005. The participation rate remains lower for inactive and unemployed persons, for older persons, and for persons with low educational attainment. The participation of older

workers is still only half of the overall rate and adults with a high level of education are still more than six times as likely to participate in lifelong learning as the low skilled.

A large part of the policy-making is focused on finding ways to encourage employers to invest in training and motivate employees to take part in it. Several Member States also see it as a particular challenge to motivate the less-educated and middle-aged part of the workforce to acquire new skills. Many measures imply financial incentives through tax reduction or grants for employers investing in training (MT, ES, EE, BG, DE, NL, IE, DK, BE, LV), but some countries have also taken initiatives to simplify the conditions for educational leave (AT, LU). The role of agreements among social partners about the implementation of lifelong learning strategies is emphasised and stressed by some Member States (DK, FR, PL, NL).

With regards to the **adaptation of education and training systems in response to new competence requirements**, there is evidence suggesting that early education is receiving increasing attention in many Member States particularly in establishing the basis for learning throughout life.

National qualifications frameworks in line with the European Qualifications Framework are being implemented or developed by the majority of countries with a view to facilitating international mobility as well as the transition between different education and training sectors. They are an important means for ensuring flexible learning pathways which are also facilitated by many countries setting up *systems for the validation of non-formal and informal learning* (AT, BG, CY, CZ, EE, ES, IT, LT, LV, LU, PL, RO, SE, SK, UK) while such systems already exist in others (BE, DK, FI, FR, IE, NL, PT, SI). The challenge here is to move from experiment to full application of such systems in national qualifications systems, including in access to higher education.

Despite renewed emphasis on apprenticeship and work-based learning, further work must be done to improve the quality and attractiveness of vocational education and training. Little progress is visible in forecasting future skills and qualifications needs, despite the efforts made by some countries to improve their infrastructures (AT, EL, LT, LV, MT, PT).

In order to share the consequences of the changing demographic situation the necessary adaptations of **pension system reforms** seem to follow some common features. Many Member States wish to lower pressures on the generations in work by keeping contributions to the public system constant and increasing employment rates, notably, motivating the elderly to continue participation in the labour market. Public measures in favour of the employment of older workers or incentives to stay in work have been designed. First of all, there are some deterrent measures, and the first measure relates to the ‘early retirement’ (or ‘early pension’) systems, which exist in all countries and in some cases date back over twenty years (Belgium, Spain, France and the Netherlands, for example). The States have taken steps to make them more of a deterrent, or more expensive, which means in general that they are no longer tending to grow, although there are some exceptions, notably in the New Member States, which are still grappling with the modernisation, or transformation, of their industrial fabric (Poland, Latvia and Slovakia, for example). In general, it seems to be necessary to redesign early retirement systems and, with specific regards to our scope, to resist them when they are meant and used as tools for the management of staff by and within the company. As an overall conclusion, we can say the European policies are in the sense of risk-sharing between the active and the retired. The National Strategy Reports indicate that most Member States are committed to preventing excessive burdens on future generations. They have taken

measures to share the burden between generations, keeping the future growth of pension expenditure under control but also insuring that adequate pensions are available for future retirees. Financial and economical features have been introduced in several Member States. There is reluctance in many countries to increase contribution rates but it is seen in some as part of a comprehensive package to ensure an acceptable balance between adequacy of incomes of those retired and the burden on those in work. Pension reserve funds have been set up and automatic balancing mechanisms have been introduced in a number of Member States. Changes in the taxation of contributions and benefits and of the indexation formula are also seen as means to achieve a fair balance between contributions benefits. Where public pension benefits are expected to decline in relation to earnings, the development of private supplementary provision has been promoted. Increasing employment rates notably of older people is a key component everywhere. To this aim, several instrumental policies regarding equality, humanisation, skill qualification, flexibility and motivation applied to work for older and female have to be implemented.

5. Demographic challenge

5.1 *The demographic change as challenge and opportunity, in the perspective of a new solidarity between generations*

As and even more than the policy tools analysed above, also the more specific **demographic approach** adopted by the EU decision making bodies presents remarkable intergenerational aspects. The working programme addressed by the Council and the European Commission *via* the Communications connected to this issue²⁷ should be developed not only in the specific guidelines that govern EU policy making: it is mainly addressed to the Member States who should try to harmonise their occupational and employment political plans in line with the EU guidelines, but also to the other actors on the European level. It is not a random case that the first policy tools adopted in order to address the demographic issue in 2005 is a green paper, a document in which the Commission fixed the terms of the debate but also opened a consultation to different subjects, calling them to express their points of view. The debate focused on the policy responses in areas such as family policy, work life balance, active ageing, migration and integration, role for the EU to allow our societies to cope with demographic change in a successful way. All this in strict connection with the Lisbon strategy and the related policies. The development of the consultation opened with the green paper “*Confronting demographic change: a new solidarity between the generations*” of 2005, have been taking into account for another communication, published in 2006, which expresses an evolution of the perspective: “*The demographic future of Europe - from challenge to opportunity*” underlines both the positive dimension of ageing and the need to seize the opportunities the European Union and Member States have to adapt to demographic change in different key areas. In the light of the results of the 2007 *Demography report*, the demographic approach has recently seen a further development with the Communication “*Promoting solidarity between the generations*”. The Communication stresses that national family policies have to respond to the needs of families as regards child and dependency care and a more balanced distribution of family and domestic responsibilities. The Communication also explains how the Commission will support the European Alliance for Families as a

27. Key documents available on line
http://ec.europa.eu/employment_social/spsi/demographic_challenge_en.htm

platform for the exchange of good practices and research. The European Parliament and the EESC have also expressed their opinion in the sense of making this support as concrete as possible.

Looking at this brief excursus of the policy instruments, it is already possible to remark that the demographic issue enjoys an intergenerational approach, which should help in the achievement of a greater social cohesion.

5.1.1 General presentation

In order to assist in the creation of policies aimed at achieving greater social cohesion, the European Commission continually assesses demographic and social developments and evaluates the quality of life enjoyed by the citizens of Europe. This obligation is set forth in Article 143 of the Treaty, which states: "the Commission shall draw up a report each year on progress in achieving the objectives of Article 136, including the demographic situation in the Community." The monitoring of demographic trends focuses on the drivers of change, ageing of the population, trends in fertility rates and the potential for meeting the challenges posed by changes in these parameters. Special efforts are made to monitor developments pertaining to the well being of families including the reconciliation of work and family life.

The EU is in fact facing unprecedented demographic changes that will have a major impact on the whole of society. Ageing, however, is the inevitable consequence of fundamentally positive developments linked to economic and social development and in particular healthier living conditions and improving medical care. A substantial challenge although does exist and, in order to cope with it, five key areas in which there are major opportunities for constructive policy responses to demographic change must be addressed:

- promoting demographic renewal in Europe through better conditions for families and reconciliation;
- promoting employment in Europe: more jobs and longer working lives of better quality;
- a more productive and dynamic Europe;
- receiving and integrating migrants in Europe;
- sustainable public finances to guarantee adequate social protection and equity between the generations.

All these features are treated within the several policy initiatives, which have been undertaken at European level, in particular by the European Commission. We will analyse them in depth in the following section, dedicated to tools. As for the previous policy practice exposed, it is useful to specify also here that the *apparently* fragmented description of the different policy instruments does not mean that they are not inter-connected. Moreover, it must be bared in mind that they represent the development of an integrated multi-steps unique policy. Once indicated the key policy measures to be implemented, the Commission in fact refers to the key instruments the EU can activate. New legislative measures but also financial instruments like the Structural Funds, social and civil society dialogue, and the Open Method of Co-ordination (OMC) are expected to play a strategic role. In addition to this, a strong intergenerational connotation to the demographic issue is revisable, especially in the responses to the green

paper addressed in 2005 by the Commission. Almost all the responses to the consultation that we have analysed mostly present a high level of consciousness that the demographic issue cannot be treated in a one-generation perspective, whereas, on the contrary, a new intergenerational pact is needed in order to face the challenges. This approach is in line with the overall EU level strategy that believes that the economic and social wellness depend on good conditions of all the age groups, and, moreover, of good relations among them.

At present, the Broad Economic Policy Guidelines (BEPG) and the Stability and Growth Pact have already focused on the impact of ageing on public finances. The European Employment Strategy (EES) and educational and vocational training policy are already mobilised to combat school dropout and to raise the level of young initial training, to promote active ageing and to improve the jobs' quality. The OMC on social protection and social inclusion have set key objectives for the reform of pension systems and of policies to eradicate family poverty. The gender mainstreaming has then informed different policy initiatives to respect equality between men and women: the social dialogue, for instance, has brought to the conclusion of agreements on parental leave and part-time working then implemented through directives. In a broader perspective, since 2000, a legislative framework has covered all discrimination in employment. Finally, the Social Fund has supported the EES and the Regional Development Fund has promoted the development of childcare and better age management in companies. The research framework programme is aiding projects associated with ageing, like clinical research, and studies on demographic trends.

This remark is useful to remind again that the correct approach to the European level policies is considering them as a whole.

5.1.2 Type of initiator

The European Commission, on mandate of the Council.

5.1.3 Target groups

The policy instruments adopted in this framework are addressed first of all to the governments of the Member States, who should keep them into consideration in their internal policy design. But in general these kinds of instruments also regards all the stakeholders, called to enact policies and actions both on the European and the national scenes, social partners and civil society organisations in particular. It is not a random case that the policy making process itself has seen them directly involved in bringing their contributions and points of view. They are called to enact the strategies set by the Commission in their activities.

5.1.4 Tools

As for the previous policy practice described, the tools, which have been used by the European policy makers, are quite varied. Beside the **communications**, the main policy tool adopted, also a **conference** has been organised in 2005, in connection with the **responses** of the stakeholders to the green paper. In the communication of October 2006 the Commission announced its intention to hold a major **European Forum on Demography** every two years. In connection with each Forum, a **report** is to be published to support an informed and constructive debate both at European level and in the Member States. Moreover, the EU heads of state and government, at the European Summit of 8 and 9 March 2007, decided to establish

a **European Alliance for Families**. In an effort to meet the challenges deriving from the demographic challenge and affecting the families, with particular regards to the compatibility of family and career, in the view of Europe's future economic and social development, the Alliance hopes to create impulses for more family-friendly policies through exchanges of ideas and experience in the various Member States and to foster cooperation and fruitful learning from each other in the European Union.

The first communication has been addressed by the Commission in 2005, and it was the **Green Paper** published in March 2005, with the title “**Confronting demographic change: a new solidarity between the generations**”. It was meant to launch a vast debate on demographic change and strategies to meet the related challenges and has been the source of a series of ideas on the present and future impact of demographic trends on the sustainability of the European social model.

According to the Commission, causes of the demographic changes are connected to three basic phenomena. The first dynamic concerns the progressive increase in longevity as a result of progresses made in the average standards of healthcare and quality of life in European countries. On the one hand, it is an historic success of the European welfare states. But, on the other, it could also involve problematic aspects, with the growing number of old-age people and hence of the non-active population²⁸, while it should lead to a new balance between generations. The second factor contributing to the “demographic crisis” is represented by the continuing growth in the number of workers over 60 (at least until 2030) when the so-called ‘baby-boom’ generation will become elderly. That generation is particularly numerous and when it will reach retirement, the balance between the active and non-active population will be negatively affected. Thirdly, low birth rates should further impact population trends. A number of elements, such as difficulties in finding a job, the lack and cost of housing, the older age of parents at the birth of their first child, different study, working life and family life choices, all contributed to decrease fertility well below the population replacement level. The structure of society is also changing radically. Family structures are changing: there are more “older workers” (55-64), elderly people (65-79) and very elderly people (80+), fewer children and young people and adults of working age. Besides, the bridges between the various stages of life have become more complex: this is particularly the case for young people, who are experiencing certain life events later (e.g. graduation, first job, first child).

In line with the Green Paper, the combined effect of these dynamics should produce a huge challenge to the European social model as we know it. The Union has no longer a *demographic motor*, whereas “never in history, has there been economic growth without population growth”.

In the introductory notes, the paper focuses on the Lisbon Strategy to meet these challenges, in a clear intergenerational perspective: the European Union has “to invent new ways of liberating the potential of young people and older citizens”. Dealing with these changes will require the contribution of all those involved: *new forms of solidarity must be developed between the generations*, based on mutual support and the transfer of skills and experience. Therefore, reforms should be introduced to get people into jobs (especially women, younger

28. The demographic dependency ratio, that is the ratio of the population aged 0-14 and over 65 to the population aged between 15 and 64 years, will rise from 49% in 2005 to 66% in 2030. In particular, in the period 2005-2050, the age group between 55 and 65 (older workers) will increase of 8.7%, while the number of individuals aged between 65 and 79 (elderly people) will grow of 44.1%, and very elderly people (aged 80 and over) will rise of about 180%.

and older people), to improve innovation, and productivity, and to modernise social protection programmes. Moreover, the role of the family, the institution having a decisive role in promoting solidarity between generations, should be an important ground to improve fertility and to encourage the reconciliation of life and work.

To these ends, new policies to increase fertility are the first measure envisaged. Immigration from outside the EU could further help to mitigate the effects of negative demographic trends with the key goals to reinforce the population in general, and to supply manpower more in particular. The third strategy proposed regards more directly the age management and the generational approach, as far as it concerns a better integration of young people, a global approach to the “working life cycle”, and a new role for active elderly people. Moreover, in the view of a new solidarity with elderly people, also the necessity to reform the social protection systems and the assistance policies is affirmed.

With regards to a “*better integration of young people*”, it seems that despite the increase in the level of education and training potentially leading to productivity growth, youth is an underestimated resource of Europe. Some indicators show present limits²⁹. To eradicate forms of exclusion, education systems are expected to raise the level of training and education, reduce the number of young people who left school with no qualifications or drop school early. More efforts are then proposed to alternate education and work and professional training to meet the changing needs of the economic forces. Social partners, public authorities and local players have the task to improve the integration of all these measures.

The rapid transformation of the labour force, with a growing role for experience and skills of older workers, should then favour a new approach to the ‘*working life cycle*’. For the Commission, the increase of employment rates for people over 55 is thus a key target. This can be implemented through a number of strategies: more flexible organisation of working time, and new technological developments to increase the quality of jobs and working environment. At the same time, the definition of lifelong learning strategies and raising the retirement age are promoted as potential solutions. This is what the European Foundation for the Improvement of Life and Working Conditions (2005) has called a new ‘life course’ approach to social and employment policy.

The increasing number of *elderly people* is expected to represent both an opportunity and a burden. The former corresponds to the better health of elderly people (especially those between 65 and 79). This is consistent with growing consumptions of goods and services and greater mobility across Europe, and new opportunities to provide services to help younger generations (children and grandchildren).

The *reform of pension programmes* is proposed to define more favourable and flexible ‘bridges’ between work and retirement. In line with this argument, the employment rate of people aged between 65 and 74 (in 2003 at 5.6% in the EU, compared to 18.5% in the US) should increase through new opportunities to combine part-time work and pension revenues. Yet, the projected burden of ageing is related to the rising number of very elderly persons (aged 80 and over): from 18.8 million to about 35 million in 2030. This portion of the European population will need appropriate care, especially high intensity care. Families will

29. Unemployment rates for people under 25 was in 2004 above 17% compared to 7% of people aged 25 and over. The risk of poverty was 19% for people between 16 and 24, compared to 12% of people aged 25-94 and 17% of people over 65.

not on their own be able to provide the needed services, while they will need the support from networks of solidarity within local communities.

As mentioned above, the Green Paper has represented the opportunity for the wide **consultation** of key actors having a stake on the impact of population ageing. It proposed, in fact, 35 open questions in all the issues briefly introduced above. The overall response has been definitely positive³⁰, and it is worth to report here the main points of some of them, as they represent policy statements of the main stakeholders, which contribute to the European level policymaking and in the realisation of the European Social Model.

The **ETUC** executive committee adopted in June 2005 a contribution to the debate. The first remarks concerned the risk of exaggeration of the demographic challenge. More than a crisis, it is defined a *foreseeable cycle related to problems and opportunities as well*. What is more, projections from the Commission do not consist of realities and thus cannot be used to justify overarching policy solutions. Moreover, while the Green Paper addresses some of the key determinants and outcomes of demographic trends (such as social protection policies, reconciling work and family etc.) other issues are under-analysed (for example housing conditions).

For the ETUC, a first concern on demographic change is related to the need for new labour market policies. Measures like those allowing a combination of retirement and employment, more innovative work organisations, more limited obstacles to regional mobility and better working conditions can be pursued through legislative interventions, the activation of resources from the structural funds but especially social dialogue.

A second issue consists of the impact of ageing on social protection programmes. Here the approach proposed by the ETUC contrasts with those of many other influent actors. Financial strains on pensions and other social policies are defined as the consequence of recent measures introduced in many countries to reduce social contributions, more than the effect of demographic trends. Moreover, the low employment rates between both young and older generations contribute to reduce financial resources for social protection. The main strategy thus consists of the revision of methods of financing of welfare programmes with more focus on profits made by companies rather than on labour. This to grant the key social goals of social protection systems that are to improve social cohesion and solidarity.

A further policy tool regards immigration. Policy makers at national and European level should interact with social partners to develop more pro-active policies of entry, residence and protection of migrant workers. This to deal with potential problems of migration flows.

Gender inequalities are another central issue to cope with negative demographic trends. Women, in fact, are an ‘under-utilised pool of labour’, a decisive source of formal and informal care to children and elderly, and at the same time are expected to give birth to more children and take their share in active ageing. The solution proposed by the European trade unions is to boost female employment in parallel with high-quality services and infrastructures encouraging the coordination between work and family life. The Scandinavian countries prove that these factors are correlated to high fertility rates. New shared care responsibility between partners within the family institutions should be improved through

30. See the EC web page
http://ec.europa.eu/employment_social/social_situation/green_paper_response_en.htm#5

parental leave and care provisions, the availability of negotiated flexible working arrangements and more universal forms of access to care infrastructures.

The ETUC also identifies some priorities to grant a *fair inter-generational contract*. The issues of security, stability and quality of jobs are between the most urgent. As put it in the contribution, for two thirds of young Europeans, employment means short-term, part-time, season, or undeclared work. And all this with important consequences on their daily lives: financial dependency on the state and/or their parents, living with a partner and starting a family later on time, etc. Encouraging young people to become independent means implementing measures to prevent them from drop out of school, improve opportunities to better jobs, and access to social protection. Older people then represent a source of opportunity to develop new and better jobs (related to the provision of care services) , given the impossibility for families to give all the needed care.

At the EU level, the Lisbon Strategy (with its emphasis on growth, employment, social cohesion and sustainable development) is defined as the key agenda to deal with all the dimensions of the new demographic cycle. It can be pursued through different instruments. Specific reference is done to Structural Funds, the EURES network (the European Job Mobility Programme) to be optimised, the renewed European Employment Strategy, and social dialogue.

Between the key stakeholders having an interest on demographic trends, the **European Federation of Retired and Older People (FERPA)** is another one of those participating in the debate.

The first and broader critique to the Green Paper concerns the lack of emphasis on the *opportunity*, rather than the risk, of population ageing. More than the uni-dimensional understanding of demography as a problem of low fertility and increased elderly population, a multi-dimensional perspective is proposed. Life expectancy gains are in fact a major change with a potential for better integration of aged persons in social and economic activities. In that respect, FERPA has stressed the key contribution represented by the Second World Assembly on Ageing in April 2002 and the United Nations Economic Commission for Europe (UNECE) conference of Berlin the same year. As its document puts it: ‘retired and older people are a resource for society, not a burden to be borne and blamed’.

FERPA fixes some key objectives: to create a society for all ages, to increase inter-generational solidarities, to promote high quality of life and high standard of health, and full employment. These goals are then defined as ‘mainstreaming’, in that they should be implemented through consistent policy measures on social protection systems, but also on employment, work organisation, health and safety at work, lifelong learning, etc.

To reach a fairer distribution of family and domestic responsibilities, a number of actors should work together. Family is recognised as a key provider of elderly and childcare, but needs the support of a broader and continuous system of care services, affirmed as a social duty. In that context “any attempt to restore the traditional role of the family and women would be hugely misguided, because that kind of family no longer exists”. By contrast, a constructive dialogue between institutions, social services’ providers, patients’ associations, and family associations at local, regional, and national level would be decisive for an effective care and services policy. Public authorities are asked to supporting families that are willing to provide care for their members. Financial support for family caregivers, the extension of

pension rights for caring activities, and specific training should be given. In this document, the establishment of a whole system of social services is defined an investment (more than a cost) that will grant universal social rights for people in need of care, and a source of good quality jobs for younger cohorts.

The European Federation of Pensioners and Older People then proposes a more pro-active role for the elderly in planning social assistance and care. The elderly population is expected to be a resource. They have a key role as buyers of good and services. Hence, pensioners' income should be safeguarded especially through tax incentives for innovative technologies (i.e. telemedicine) to improve the quality of their lives. They are particularly active in voluntary activities, within the family (especially childcare) and in the broader social context (in not-for-profit organisations). In line with the need to safeguard the universal access to social protection, the public pension and health systems should be improved, with a special focus on combating poverty, and to develop disease prevention and palliative care. What is more, public authorities at all levels should reinforce the opportunities for the participation of the elderly to social life: voluntary activities to give care, but also non-formal education schemes and life-long training, are examples of a broader social (rather than just economic) activation. School could then promote joint training activities while retired teachers could be made tutors for young students. Social dialogue and new forms of civil society dialogue should be implemented to increase labour force participation for people aged 55 and over, to invest in human resources, and to introduce flexible retirement arrangements enabling part-time work with partial pensions.

About the present and future EU role, FERPA concentrates on some main lines of action. The first consists of tax incentives and especially a reduced rate of the VAT (an area of EU competence). To help families to provide care and to boost solidarity between generations. Secondly, structural funds should support lifelong learning, the use of new technologies and to combat old and new forms of social exclusion. A wide process of exchange of good practices is another issue to be dealt with by the EU: especially through the URBAN action plan for the organisation of social services at local level. The Commission is then asked to establish specific forms of civil society and social dialogue, as a vital asset for the economic and social development of Europe. The open method of coordination is proposed to improve learning on minimum quality standards, especially in the healthcare and long-term care.

While FERPA has based its comments on the arguments of the United Nations on demographic changes, UNICE (nowadays BusinessEurope) has done explicit reference to the report of the High-level group on Mid-term review of the Lisbon Strategy (or Kok group).

The response from European employers firstly consists of a critical assessment of the Green Paper in two main respects. UNICE has expressed its deepest concern about the fact that the Commission did approach the challenge exclusively from the prospect of individuals and thus lacked a sufficient account of companies' needs. This leads to the lack of a proper identification of responsibilities of all the actors concerned: not only, employers, but also public authorities, individuals and social partners in general. Then, the paper is defined as a source of bias towards emphasising the work-life balance policies to the detriment of other dimensions of the problem: especially the long-term sustainability of pensions and healthcare systems, and labour market reforms.

In terms of the challenge to cope with, the first reference is to the growing strains on public finances that in case of no reforms will lead to increased taxation and labour costs. This, in

turn, is related to the alarming dependency ratio that will affect some countries more than others (e.g. Italy shows the highest level in the next decades). Consequently, the decreased labour market participation will further affect the EU. A second source of preoccupation is consistent with the decline of productivity rates, often not reflected in wage formation. This element is indicated as one of the reasons for the lack of competitiveness of Europe. Third, the aggravation of the skills gap effect of the ageing of the work force and the lack of effective long-life learning and training activities.

The effective reply to these challenges should consist of a number of measures consistent with two key lines of argument: the need for an inter-generational approach to ageing, and the revision of the working-life cycle perspective. The former is to inform reforms on public finances, with the progressive removal of public deficits to avoid to shift the burden to next generations, improving the efficiency of education and training, as well as that of labour-markets (to improve employment rates between the older population), and offering a more favourable economic and social context to young and older entrepreneurs. An explicit focus is on the innovation of social protection with a twofold goal: reduce their impact on the state budget, and remove unemployment and poverty traps.

As for the revision of key aspects of the working life cycle, this is defined through three key issues. Life-long learning is defined as a necessity for individuals, which have to improve their competencies to adapt to labour market changes. Make learning more attractive and flexible should be a priority for each member state. The second aspect is the reconciliation of family life and work. Here UNICE criticises the key reference of the Green Paper to the development of parental leave as the main solution. By contrast, measures to further increase the role of childcare facilities and ‘all-day’ schools are identified as more promising instruments to favour new balances without negative effects on social policy and labour-market costs.

As for the role of the European Union, the UNICE’s view seems prudent than those of the other social partners. The EU should act as ‘a catalyst for action in the context of the European strategy for growth and jobs’ and to promote a genuine debate based on the exchange of experiences on solutions found in different countries. Yet, the ‘ingredients’ of the policy mix to cope with that challenge can only be decided by member states. The key focus is thus on the Lisbon Strategy to improve synergies between policy areas and processes. The new Integrated Guidelines for growth and jobs (IGs) together with the Open method of co-ordination on social protection and on education and training are explicitly defined an important instruments for the monitoring and evaluation of progress made in national implementation and as a source of inspiration for effective solutions. Explicit reference is done to the role of the European social dialogue to tackle the issue as proved by the framework of actions on gender equality adopted in March 2005. More flexible working arrangements are to be mutually acceptable for both companies and employees.

The **European Older People’s Platform, AGE**, is one of the most active social NGOs on social policy with a specific mandate on the conditions of the elderly. In 2005, that organisation has contributed to the debate through the consultation of its national members and the organisation of a seminar at the European Parliament with the participation of the Inter-group on Ageing and of other relevant NGOs, like the European Youth Forum and the European Women’s Lobby. All these efforts have led to its response to the Green Paper.

AGE has firstly proposed some preliminary critical remarks on the Commission's approach. First, the response to demographic challenges should be realistic without implicit alarmism. As well as the FERPA's document, AGE has defined ageing as 'one of the proudest achievements of recent social and economic development in Europe'. Then, a broader approach to demographic trends is needed, through both an attention to the quantitative effects (social protection expenditures growth, etc.) and qualitative outcomes (the transformation of social institutions, etc.). This must be combined with a more subtle analysis of the changing nature and diversity among the elderly, for example through a clearer distinction between old (between 65 and 79) and very old persons (aged 80 and above).

As far as longer life expectancy is concerned, for AGE it is not a problem in itself in that it is the effect of better living and working conditions, and medical progress. Demographic projections proposed by the Commission do not take on board the foreseeable impact of stress and environmental pollution, and of new lifestyle related risks for today's young generation (e.g. obesity, cancer, abuse of drugs, alcohol and tobacco). This means that projections vary depending on the assumptions they are based on. Another critical remark concerns the most effective response to population ageing. Here the European platform for older people stresses the importance of two concepts: choice and confidence. On the one hand, citizens should have the real opportunity to choose how to reconcile work and family life through appropriate employment and social policies. On the other, this is possible through building a widespread confidence on welfare programmes to secure their old age. Explicit reference is done to some measures: increase of childcare and eldercare facilities, financial compensation for care duties (e.g. care credits and pension rights for informal careers), as well as support and training for informal careers, development of elderly care structures to promote employment in this field, etc.

The document then gives a particular emphasis to the problematic nature of immigration. Migrants are not to be considered just an economic factor. By contrast, the social dimension of the phenomenon and the consideration of needs of individuals and their families should be addressed by policy makers to avoid risks of creating a 'second class citizens'. In that respect, a common policy on migration must provide the same level of social protection to migrant population and to EU nationals, and deal with two key issues: the exploitation of migrant labour (through low pay, low status, unsociable working conditions), and the risk of the brain drain and economic loss in the countries of origin.

Different strategies are thus identified for building inter-generational solidarity. The first line of action is related to the social and economic integration of younger generation. The best way to avoid poverty in old age is to be engaged in well-paid work throughout working age, in good working conditions, and in good long-life. The second issue is about making training accessible to those most in need of it (e.g. young, older and female workers) in parallel with more flexible arrangements able to meet the wishes of the employees (e.g. mentorship, gradual retirement, etc.). AGE proposes the raising of the average retirement age through incentives more than mandatory retirement age. A significant number of older people (and especially women) face poverty and social exclusion. And this problem will be even more alarming in the future because of more fragmented careers and of recent reforms shifting the method of calculation of old-age benefits now increasingly based on the average revenues of the entire career rather than on the 'best years'.

As for the role of European institutions, AGE's response has stressed the need for discussing demographic changes and inter-generational solidarity at the EU level because all these issues

have a tremendous impact on policies under the competency of the Union. AGE has asked for more coordination between economic, employment and social policies and migration, transport, housing, research and education as well. 'EQUAL-like' initiatives could then contribute to innovative approaches to extending working lives, with a parallel focus to both young and older workers. 'Making work pay' is judged to be not enough to face labour market changes. The EU is to increase efforts for more quality jobs.

AGE finally recommends that the Commission publish an annual report on the European response to demographic change, with a summary of what single members and EU institutions are doing on the issue. The annual report should be debated in an annual roundtable on demographic change with the active participation of stakeholders and national policy maker and the European parliament. All this to help prepare the post-Lisbon Agenda.

Another interesting contribution has been given by the **European Youth Forum**, an international youth platform established by national youth councils and international non-governmental youth organisations, to represent the interests of young people from all over Europe in international institutions – principally the European Union, the Council of Europe and the United Nations. The Youth Forum serves to channel the flow of information and opinions between young people and decision makers. The intervention of the YF with regards to the green paper³¹ of 2005 is in a proactive view: young people have indeed a lot to contribute to update and then redesign the European Social Model by taking into account the new reality of the European society, in which both younger and older people are in a vulnerable position and deserve special attention from policy makers.

The first critical remarks have been in terms of necessity of *building trust for a vulnerable generation of young people*. The main problem is that the necessary opportunities are not given to young people to live the life they want to lead. The European Youth Forum believes that the priority must be given to policies aimed at addressing young peoples' needs. If opportunities are guaranteed, the Europeans will actively contribute to the European economic and social renewal that the Lisbon strategy looks for. The European Youth Forum strongly supports the development of a new Intergenerational Pact and is committed, in collaboration with older peoples' representatives, to working towards such a pact in the coming years. Although it is believed that there are no trade offs to be made between young and older people, the YF shares the analysis conveyed in the High Level Group report that this new Intergenerational Pact should be "focused on young people and based on confidence in the future".

A specific remark is done with regards to the future possibilities offered to young people to develop their own *autonomy*. In this sense, the main problem is that the necessary opportunities are not given to young people to live the life they want to lead. Today, young people face many challenges: a particularly high risk of poverty, twice as likely risk to be unemployed as the average, mostly precarious working conditions, often no access to unemployment State subsidies. The work done to date on "youth autonomy" should play an important part in transforming this vicious circle into a virtuous one. Young people need to have opportunities *now* if they are to have a better and more fulfilled life in the future and if they are to achieve their potential and contribute to democracy, stability, prosperity and welfare for all. It is the role of the member states and the EU to provide these opportunities.

31. See the website of the Commission quoted above, and the web page http://www.youthforum.org/Downloads/policy_docs/social_conditions/0406-05.pdf

One of the grounds on which it is possible to engage concrete measures is the one of education. If the real challenge is to develop a “knowledge society” in Europe, alongside the “knowledge economy”, a situation needs to be achieved in which more people are better educated to avail the opportunities of life and where phenomena such as young people leaving school without qualifications are eradicated. To that end, Member States should promote better links between the educational/training institutions and the labour market, between formal education and the business sector. Alongside the formal education system, non-formal education contributes to the development of young people, empowering and enabling them to actively participate in a rapidly changing environment.

Moreover, young people should be put in a position to consider a career where they become self-employed or where they engage in entrepreneurship, and get the necessary support if they wish to do so. This could be encouraged by simplifying procedures, by providing financial supports to young entrepreneurs and ensuring that there are public services and facilities in place to provide training and/or advice and support in starting a business, as well as appropriate “security nets” in order to face the risks connected to the entrepreneurship.

Another field of intervention regards the development of a *new intergenerational Pact*. The European Youth Forum believes that the increased participation of older people and of younger people in the labour market should be at the core of the strategy on demography. Both younger and older people in fact have mutual interests for increased participation in the labour market. However, many young and older people are today in a situation where they want to work but cannot find a job. Moreover, the labour market discriminates on the basis of age to the detriment of both younger and older workers. The priority of European policies must be to fight against age discrimination and to create enough employment opportunities so that every person has the opportunity to work if they so wish. In connection with the aim of *more jobs*, the aim also has to be to raise the *quality* of work. The promotion of security and health at work and the reconciliation of working and family life are two important ways to increase job quality. The European Youth Forum encourages the Commission to further work on the concept of the “working life cycle” that appears as a good tool in promoting individuals’ freedom of choice. This new organisation of work life would allow young people to decide when to work, thereby increasing their motivation when working and positively impacting upon total labour productivity.

In a very strong intergenerational perspective, the EYF believes that *intergenerational solidarity has to be rethought*. Today, many young and older people are experiencing very challenging living conditions in our “long term unemployment” societies. These important changes must be taken into account in the way in which European social systems work so as to offer more opportunities to young people. A broad debate on pensions urges, giving full voice to the representatives of the civil society, including older peoples’ and younger peoples’ organisations. This could be done by revisiting the Open Method of Coordination on Pensions, in force at the European level since 2001. The European Youth Forum does not contest the fact that a significant proportion of older people are at higher risk of poverty; nevertheless, it calls to the urgency to rethink the social protection systems. The idea is to design an “intergenerational solidarity plan” in which the European Social Model would take into account the demographic changes that have taken place in European society during the last decades. This plan should avoid presenting the demographic issue as a tension between young and older people, but rather promote social cohesion, notably between the different generations.

As for what has emerged at national level through the collection of good practices, also the European Youth Forum recognises the importance of *building and increasing “intergenerational learning”*. Building “intergenerational learning”. Every year greater numbers of Europeans are reaching the age of retirement. The European Youth Forum believes that the retirement of older people without ensuring the transmission of their knowledge is a waste of valuable human resources. It therefore calls for the design of an “intergenerational learning scheme”. The intergenerational scheme proposal would be to accommodate a job sharing scheme between older workers who want to progressively move towards retirement and younger people in the process of entering or moving within the labour market. The older worker would be able to have shorter weeks of work and would be able to actively contribute to society by educating a younger worker for the future. This “intergenerational learning scheme” is all the more important as it would contribute to social cohesion and mutual understanding in a European society in which it will happen that more and more people from four different generations will live simultaneously and side by side. However, it is only an example of what could be done to link young and older people.

These contributions, together with all the others, have been collected and discussed in a **European Conference**, organised by the European Commission. The conference brought together ministers, members of parliament, social partners, NGOs and independent experts. The aim of the conference was to explore some of the answers to the many questions that are developed in the Green Paper. The debate focused on the policy responses that are needed in areas such as family policy, work life balance, active ageing, migration and integration, role for the EU to allow our societies to cope with demographic change in a successful way. The conference, hosted by Commissioner Spidla, consisted of a political round table plus 4 different workshops in which various stakeholders discussed desirable policy changes.

Further development to the approach of the Green paper and the conference is revisable in the following communication of the commission, “**The demographic future of Europe – from challenge to opportunity**” of 2006³², where the remarks of the stakeholders during the consultation phase seemed to be taken into account. This communication develops a reference framework at Community level for Member States' policies. The framework has set out five areas that respond to a common perspective of restored confidence:

- Promoting demographic renewal
- Promoting employment: more jobs and longer working lives of better quality
- A more productive and dynamic Europe
- Receiving and integrating migrants in Europe
- Sustainable public finances: guaranteeing adequate social security and equity between the generations.

With regards to the first point, the Commission states that the EU Member States can prevent demographic decline or react to the falling birth rate, which for some of them is reaching a worrying level. These reactions are both necessary and realistic: *necessary* because surveys show that in all EU countries couples would like to have more children; *realistic* because

32. <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2006:0571:FIN:EN:PDF>

international comparisons underline the effectiveness of family and other policies consistently implemented by some countries over several decades to create conditions supportive of those who wish to have children. There are many different such policies but they generally have three aspects in common, aiming to reduce the inequality of opportunities offered to citizens with and without children, offer universal access to assistance services for parents, in particular for education and care for young children, and manage working hours to offer both men and women better opportunities for lifelong learning and for balancing their private and working lives.

With regards to the promotion of employment in the view of more jobs and longer working lives of better quality, increased efforts will be needed to reduce the segmentation of the labour markets, pursue the increase in the number of women in work, increase the efficiency and equity of education systems in order to enhance skills and foster the integration of new entrants who suffer from this segregation. This, in particular, will be the aim underlying the implementation of “flexicurity” guidelines, which should facilitate the transition between different stages in the life cycle by means of increased flexibility of the labour markets, lifelong learning and active labour market and social security policies. The involvement of a large number of stakeholders with different levels of responsibility - workers and companies – by means of social dialogue and corporate social responsibility will be required. Demographic ageing, however, calls for strategic importance to be given to increasing the rate of participation of men and women aged over 55. In this sense, *active ageing* constitutes in itself a comprehensive and sustainable approach, which must employ a range of tools beyond retirement reforms. Moreover, it is affirmed that continuing to work after the age of 60 should no longer be, as it is today, the prerogative of high income earners and the highly qualified. The participation of people aged over 65, including those who are officially retired, in the economic and social fabric must be promoted as an opportunity and not presented as a constraint. This increased participation in social activity on a voluntary basis will be achieved by means which have largely yet to be created.

A third response to the demographic challenge is to improve the productivity of Europeans at work. The ageing population can even represent a good opportunity to enhance the competitiveness of the European economy. European companies should be able to take advantage of better conditions to grasp the opportunities offered by demographic change in terms of creating new markets for goods and services, which respond to the needs of an older clientele. A first step in this direction would undoubtedly be to encourage companies and other economic actors to incorporate the ageing phenomenon into their innovation strategies. This concerns a number of areas such as information and communication technologies, financial services, transport, energy and tourism infrastructures and local services, in particular long-term care. In all these areas the European Union can supplement or to strengthen planning efforts of the Member States.

In the view of guaranteeing adequate social security and equity between the generations, the Commission recalls member states to revise their pension systems: solidarity between generations could in fact be jeopardized if the burden of ageing had to be carried by the younger population, decreasing in number and economic strength. Remedying this situation is one of the priorities of the new pact between the generations.

A further policy step has recently been taken with another Communication, which is more specifically targeted to the intergenerational issues connected to family. The Commission’s

Communication on “**Promoting solidarity between generations**”³³ aims at supporting Member States in meeting the demographic challenges of a declining birth rate, in particular the need to ensure that European workers achieve a better work-life balance, so that families can combine work with their childcare commitments. As part of the follow-up to its earlier Communication, in addition to the five areas of intervention mentioned above, and in particular relation to the reconciliation of work, private and family life, the Communication points to the following:

- financial support to cover family-related costs;
- high quality care services for children and dependent older people;
- flexible working hours with appropriate leave arrangements.

Member States should encourage policies which support parents in the raising of their children and allow them to have the number of children they desire, rather than the number that they think are feasible, given current work–life balance constraints.

The Commissioner for Employment, Social Affairs and Equal Opportunities, Vladimír Špidla, has commented that “far too many men and particularly women in Europe still have to make difficult choices between family life and a successful career’ and that the conditions must be created for people to have both. Women continue to bear the lion’s share of care responsibilities”; he warns that, unless stronger emphasis is put on gender equality and on the promotion of better work–life balance, ‘low birth rates will persist’. He refers to data that reveal an employment rate gap of 14.2% between women with children and those without³⁴. The data also show that few men take advantage of existing provisions for parental leave. With regard to the latter, the Communication identifies six areas where leave provisions could be improved: incentives for fathers to take parental leave; employment rights prohibiting discrimination in relation to the uptake of parental leave; duration of parental leave; flexibility in relation to the uptake of the leave; the age bracket of the child for which leave provision is available; payment during parental leave.

With this specific respect, differences remain in the approach taken by the social partners. Based on the responses to a first stage consultation initiated in October 2006, mainly worker representatives see a need for action at all levels, including EU level, while employer organisations mainly argue for action at national, sectoral, regional and/or company level. Additional difficulties emerge due to the existence of different types of provision in the Member States, and the Communication is strongly in favour of adopting measures that would address these issues.

In the context of employment policies, the Communication encourages Member States, the social partners and civil society, as well as the EU, to assist in the construction of flexible working time, with appropriate work schedules and leave arrangements. According to the Communication, Member States that favour family-friendly policies in areas such as equal access to employment, parental leave for men and women and equal pay generally have higher birth rates, and a higher proportion of women in the labour market. The Commission has also adopted the second stage consultation with worker and employer representatives on

33. <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2007:0244:FIN:EN:PDF>

34. Europa press release, 30 May 2007

how to achieve a better balance between work, private life and family life. The social partners are required to provide the Commission with their opinion or, where appropriate, a recommendation for proposals on new types of leave together with improvements to maternity leave.

The Communication also sets out how the **European Alliance for Families** will act as a platform for the exchange of knowledge and experience between Member States on the best ways to support families through policy and other measures. The Alliance was established on the initiative of the German Federal Minister of Family Affairs, Ursula von der Leyen, under the German Presidency at the end of May 2007. On May 2007, the employment and social ministers of the EU Member States decided on further steps for the European Alliance for Families. An important element of these measures is the creation of a web portal to foster reciprocal exchanges and to provide information to the general public. The portal will offer links to detailed, country-specific information on the activities of the individual Member States of the European Union in the area of family policy. It will also present an overview of important studies on the subject of family policy and advertise current events on relevant topics.

5.1.5 Duration of the action

Not specified. Actually, the continuous update of the situation by the appointed bodies is supposed to be in the long term, and the Commission has always the power to promote new interventions. Anyway it is foreseeable that at the end of the period of action of the Lisbon strategy, also the policies specifically focusing on demography will be revised (2010).

5.1.6 Feedback

There is a continuing need for monitoring the social situation across the 27 Member States. Identifying those groups at greatest risk and the issues confronting them are tasks, which need to be performed at regular intervals. Documenting these findings in a comparable way provides Member States with valuable evidence on which to base their policy making. The European Commission is committed into monitoring the social situation across the EU, making use of a series of tools.

The first one is the **Commission Social Situation Report** - published since 2000 -, which provides both an overview of the social situation in the EU and a description of developments in selected areas, the latter supplemented by an extensive collection of Statistical Portraits prepared by Eurostat. The Statistical Portraits provide a recurring look at some 20 leading indicators of relevance to the social situation. These range from economic indicators to indicators of well being such as accident rates and figures on the extent of gender equality. Thus containing a range of social indicators, harmonised quantitative information and public opinion survey data, the report acts as a reference document and a tool for monitoring social development over the course of time.

The **European Observatory on the Social Situation and Demography** consists of four multi-disciplinary networks of independent experts established for the European Commission in 2005. Its aim is to analyse social and demographic trends and to assist the Commission in its duty to report on the social situation. The Observatory produces an overview of the social and demographic situation as well as research notes and shorter policy briefs on specific

issues of high policy relevance. The main contribution of the observatory is the monitoring reports.

As announced in 2006 the Communication, a European report In the communication of October 2006 the Commission announced its intention to hold a major **European Forum on Demography** every two years. The Forum offers the opportunity to Member States, stakeholders and experts from all over Europe and from a wide range of fields to exchange best practices and to reflect on how to prepare best for the consequences of the demographic transformation that is taking place in Europe. The first 'Forum on Europe's demographic future' took place on the 30-31 October 2006. It brought together 400 representatives from Member States, stakeholders and experts from around Europe to discuss concrete ways of taking on the challenges outlined in the Commission's Communication. In connection with each Forum, a **report** is to be published to support an informed and constructive debate both at European level and in the Member States. It will present an assessment of the demographic situation every two years, reflecting the ongoing debate and research in the EU, in conjunction with the European Demographic Forum.

Specific **“political” feedbacks** on the last communication of 2007 “Promoting solidarity between generations” have been provided by the European Economic and Social Committee and the European Parliament. Both reports interesting remarks strictly regarding the role of family as fundamental *forum* to deal the intergenerational relations and in particular the relation to work. We report them as a concrete contribution of the European institutions to the debate, and as strictly falling in the scope of SPReW.

The **European Economic and Social Committee**, in its 2007 opinion³⁵ generally welcomes the initiative of the Commission. It notes that despite the title of the communication, it concentrates on the family, including the new Alliance for Families, recently established by the European Council. The amount of activity currently being witnessed at Community level amounts to an important renewal of interest and action in the area of the family after a long break. It is also – as the Commission's Communication itself states – "the first stage in a European response to the challenges laid down by demographic change".

There is no doubt that the question of inter-generational solidarity is a very broad and involved one and is in turn part of a more complex set of challenges posed by various social, economic and international changes underway, among them population ageing, which will have a substantial impact on the lives of Europe's citizens in the future, especially on working and social conditions. The meeting of generations that is played out and develops within the family is an enormous challenge from which Europe is not exempt. The family is the natural forum for solidarity between the genders and through the life cycle. Social change has resulted in the emergence of a wide range of different family structures. When designing measures, account must be taken of all the different family situations, with due respect for subsidiarity and national legislations. The most recent reports on the socio-demographic situation tell that in several countries the number of family units is growing, while their size is dropping. At the same time, the structure of families is changing far more rapidly than was once the case due to several factors. Despite the above, the European institutions have so far found it very difficult to see the family as a social structure that plays an essential role in

35. SOC/277, 13 December 2007, Rapporteur: Jahier,
http://eescopinions.eesc.europa.eu/viewdoc.aspx?doc=\\esppub2\esp_public\ces\soc\soc277\en\ces1711-2007_ac_en.doc

present-day society and for this reason merits greater interest from the Community. Although there is no shortage of official declarations from the most disparate public bodies at international and European level ascribing to the family a crucial role in society, in practical terms, Europe appears as yet not to have included the family in its priorities, which rest essentially on two pillars: the forces of the free market and competition, on the one hand, and equality of opportunity for all citizens, on the other.

Generally speaking, the European Commission continues to address the issue of the family from the vantage of social policy, employment and equal opportunities. As a rule, however, in many documents dealing with matters such as young people, children's rights, education issues and so on, the actual notion of the family almost never appears and the approach focuses essentially on individual rights or on the individual as an economic actor. Rarely is he viewed in terms of his relationships. However, the family continues to play an important role in sustaining a person's growth, overseeing his integration in society and work and, very often, taking upon itself the burden of illness and of any brief or sustained period of disability and reliance on others. The social services provided by the state or the private or social market remain essential, especially in promoting reconciliation of work and family life, preventing family poverty and unemployment, and supporting and helping families afflicted by illness, substance abuse, child-rearing problems and domestic violence. Nevertheless, these services are not enough in themselves to adequately meet the emotional and psychological needs of the individual, be it the person cared for or the carer.

The EESC expresses its appreciation of the Commission's Communication, which sets out a practical agenda for lending substance to the proposed Alliance for Families, a constructive platform which takes on board a number of the suggestions already formulated by the EESC and more generally in the debate in recent years to respond to demographic challenges, support cooperation and partnership between various players, promote a better response to the needs of families looking after children and other dependants, improve reconciliation of work with both family and private life – including with a substantial investment in quality services for children and for families – and so help to establish a new and more robust solidarity between the generations.

The deplorable fact remains, however, that the lack of support from some Member States has made it impossible to apply the open method of coordination to this area, which would have given the Alliance greater strategic and structural weight. The EESC recognises, nevertheless, that the Communication provides possible foundations on which to develop an organic platform, which does not prejudice the possibility of further developments based on more explicit coordination. Vigilance will be required, then, to ensure that after the crucial impetus, this new work does not get sidelined.

The Commission's Communication itself sets out some helpful and detailed ways forward in terms of both goals and initial steps (such as the establishment of a high-level group of government experts on demographic questions). Active involvement of local and regional actors is particularly important, given the ever more important and central role these institutions play in the provision of social services and delivering innovation.

The EESC believes that the creation of an observatory on best family policy practices within the European Foundation for the Improvement of Living and Working Conditions should be supported, and recommends to achieve this through close consultation of civil society players – in particular family associations – at various points during the process, both in identifying

these best practices and in appropriate opportunities for comparing and reflecting. Vigilance will then be required to ensure that the prime focus of this observatory is not limited solely to family issues involving work, but that it is also directed towards the compilation of a detailed survey on the needs of the family and the generations and on measures and funds available for safeguarding and promoting the development of new forms of solidarity between the generations. This would help to map out the current infrastructures of social citizenship in the Member States.

There are two further areas that have been little explored and which the EESC believes need greater and more careful attention: in the main, *housing policies* are still conceived within a life cycle in which the part devoted to work was absolutely predominant and which no longer seems to correspond to the present reality. This is especially true of social housing, be it promoting family crèches or the right of those needing care to live at home and have a real possibility of doing so; then, more attention should be paid to the situation of disabled or highly dependent people.

Finally, two specific steps should be made. First of all, it would be wise to establish a more precise family mainstreaming of the various EU policies to systematically cover both the impact on families of individual measures applied and the family dimension within the various sectors of the Union's social and economic action. In this connection, the EESC thinks the Commission should relaunch the Interservices group created in 1989 but subsequently abandoned, which would make it easier to coordinate its action in this area. Secondly, the EESC remarks the need for systematic consultation of Europe's citizens, and especially family associations and social partners, to enable better on-going assessment of measures taken, more efficient dissemination of information and support for this process either financially or via the establishment of appropriate procedures and forums. The EESC itself could prove to be an excellent institution to give structural stability to this task.

The **European Parliament** adopted on February 2008, a non-legislative resolution inspired to the topics treated in the last communication of the Commission but also with respect to the other policy measures promoted so far. In this resolution, very concrete and interesting proposals are put forward, as a contribution to the whole debate on the demographic challenge.

The rapporteur Françoise Castex firstly underlines the theme of the “**abnormally low**” **birth rate**, putting in evidence that, although "maternity choices are among the most private decisions men and women may take, and must be respected", the current trend does not reflect real women's choice or European citizens' actual aspirations for creating a family. It may be linked to the difficulty of reconciling work with family life (lack of child-care infrastructures, social and economic support for families, and jobs for women), to the anxiety-inducing social environment (unstable work situation, expensive housing) and to a fear of the future (late access to employment for young people and job insecurity). Birth-rate curves can indeed be positively influenced by "creating a family- and child-friendly material and emotional environment". The Parliament recommends *inter alia* that Member States provide tax breaks for company crèches and take measures against employers who directly or indirectly discriminate female workers who wish to have children.

In more particular terms, the Parliament is concerned by the increasing problem of **infertility** in Europe, which affects around 15% of couples. Parliament calls on the Member States to ensure the right of couples to universal access to infertility treatment.

With regards to **family support**, the Parliament acknowledges that a society that places children at the centre of its policies is the precondition for a healthier birth rate. It proposes a series of measures to improve family support. These measures range from the provision of childcare for at least 90% of children from age 3, to greater parental support and tax breaks for company crèches, as well as a better application of relevant directives, including Directive 2006/54/EC on the equal treatment of men and women in matters of work and employment and Directives 96/34/EC and 97/81/EC. In particular, the Parliament says that EU *paternity law* needs to be improved and urges the Commission to propose specific measures for an entitlement to paternal leave. Fathers' rights regarding the upbringing and care of children, particularly in case of separation or divorce, should be promoted. Parliament also calls on Member States to recognise the social, economic and educational value of informal family work in the form of caring for children and other dependants, while examining the possibility of recognising length of service, social security and pension rights for those who carry out such informal work.

The **human resources challenge** brings the Parliament to note that, faced with an imbalance between the active and non-active population resulting from demographic change, the EU has substantial scope to increase the employment of women, young people, senior citizens and people with disabilities. It calls for a reform of current European human resource management which, by under-employing people aged less than 25/30 and people over 55, limits to approximately 30 years the working life of a large part of the population. MEPs consider that the measures envisaged having regard to demographic change must take account of the increase in productivity of all the working population, thus “not only is the ratio of economically active to economically non-active people significant but also the increase in productivity”.

Other aspects and proposals concern the **older workers and population**. The EP calls for practical initiatives to enable older people to *work longer, even beyond 65*, if they so wish, so that they can pass on their particular work experience to young people, other workers and employers. Parliament believes that people over the legal age of retirement today have a better life expectancy and higher quality of life than ever before and that Member States should promote and not prevent the establishment of rules enabling the prolongation, voluntarily on the worker's part, of working life after the legal age of retirement. It also considers that the time has come to address the issue of “*pensioners' stress*”, namely the feelings of dejection, uselessness and nihilism experienced by workers a few days after retirement, when they perceive themselves to be useless, abandoned, and without a future. Incentives should be proposed which will make it easier for young people to enter the employment market, for example by encouraging workers who have reached retirement age to act as mentors for young workers and by introducing job-sharing and part-time working, with a view to facilitating the hand-over from one generation to the next. Generally, Parliament encourages Member States to maintain a budgetary balance between revenue and expenditure in the various pension schemes and commends the Member States, which set aside budgetary appropriations each year for the payment of future pensions.

Recalling the huge *contribution made by older people to social cohesion* and to the European economy, Members also emphasise that these people constitute a market referred to as “*grey gold*”, due to their consumption of goods and services (including leisure, care and welfare services). They, therefore, call on Member States to promote measures to encourage the physical well-being of older people and to support the exchange of experience between

regions in which the ‘silver economy’ plays a major role in regional development, in general (notably through the use of Structural Funds).

Members also focus attention on the *maltreatment and lack of care*, to which the elderly are exposed, within their families or within the institutions in which they are placed. They urge Member States to take instant action in this domain as, according to estimates, some 10% of older people experience some form of physical, financial or mental abuse before they die. A warning system could be developed as well as penalties for maltreatment of this kind.

In a territorial perspective, Parliament notes that the impact of demographic change on **individual regions** is serious and requires different adjustment strategies depending on whether the region concerned is a region of migration or of shrinking population. The Commission should promote, as part of territorial cooperation, EU-wide networks in which regional and local authorities and civil society actors can learn from one another about tackling the problems resulting from demographic change.

In order to actually foster a **new solidarity between generations**, Members of the European Parliament note that the demographic future of Europe creates new problems, as regards democratic mechanisms, and that “in an ageing society the political representation of minors, who represent the common future and the political future of the Community”, must be better taken into account. They, therefore, ask that the voice of young people be better taken into account and that they be included in everyday decision-making.

5.2 Demography and the labour market: a challenge for the unions

5.2.1 General presentation

The European Trade Union Confederation takes the issues raised by demographic challenges very seriously, as they are having, and will continue to have, a profound impact on how we work and live in Europe. Therefore the need is to handle them correctly, without dramatisation or the imposition of answers, which, without being neutral in social or economic terms, can have negative consequences in the long term. The answers to these challenges can only be integrated both in their identification and their implementation, and they must involve all the relevant players.

The trade union side is a crucial element here. In particular the ETUC considers that it is important to be discussing this subject within the European trade union movement and to make known the trade union's experiences in the area of anticipating and managing demographic change, *in particular at the workplace, and from the angle of solidarity between the generations*. The issue is to create the right conditions so that young and less young people alike can find their place and thereby contribute to the economic and social development of the societies, as well as their own involvement and social well-being.

The good practice “Demography and the labour market: a challenge for the unions” represents a project development in the view of involving trade union movement all over Europe, under several points of view. The actions undertaken within this project, in fact, involve a research assessment of the measures provided within the different Member states through general policies by the public authorities, and through actions taken by social partners, with regards to the situation of young and older workers. Also the situation of actions at company level has

been monitored. This assessment has allowed to draw some thematic summaries in the different Member states in which the ETUC affiliated trade unions operate, to collect some “testimonies”, and to finally draw some very concrete guidelines, particularly addressed to trade unions, aimed at implementing measures to tackle the demographic challenge on the labour market.

The results of the project show that actions taken so far in this field are numerous, and the outcomes very varied. In particular, among the examples analysed, there are actions aimed at improving the skills of young and older workers in a lifelong learning setting, negotiating and promoting active policies in the fields of employment and training, wage and organisation environment and quality content of work, as well as in the fields of protection of health and safety, in a view of proactive partnership between social partners and also with the public authorities at various levels.

Probably the most important lesson drawn from this project is linked to the need to drive forward the mindsets of employees, employers and the public authorities with regard to the challenge posed and notably the opportunities opening up for getting quality established at the very heart of the demographic policies: the quality of the involvement in the workplace, the quality of work through a person’s active life, and the possibility of choosing to extend it. Effective, fair social protection policies need to be in place to enable these challenges to be managed.

As an overall consideration, another reason why this project is outstanding is represented by the fact that it not only offers a general overview of the national situations with regards to age management from the point of view of the trade unions, active stakeholders on the European and the national scene. It also underlines a fundamental instrument that can be used both at European, national and company level: the social dialogue. Intended as the exchange of views and the designing of specific proposals and solutions by and between the social partners, it can definitely represent a fundamental tool, complementing public authorities initiatives, for the development of innovative and specifically targeted measures, which bring to intergenerational cohesion.

5.2.2 Type of initiators

The European Trade Union Confederation has promoted the project, financed by the European Commission under the budget heading 04.03.03.02, aimed at promoting "Information and training measures for workers' organisations".

5.2.3 Target groups

The project has involved all the national trade union organisations affiliated to the ETUC. The different actions have been undertaken taking them as a point of reference, and as first addressees of the political guidelines for the action.

5.2.4 Tools

The project has been developed following several different actions.

The first and main instrument has been represented by a questionnaire, whose contents have been defined by the ETUC. The aim of the questionnaire was to assess the situation of the younger and older workers in the different Member states, to provide national information about general policies implemented by public authorities and about actions undertaken by the “social partners” with reference to the demographic challenge. The questionnaire replies have been analysed and synthesised in a summary, which offers a general overview of the national responses to the demographic issue.

Beside the importance of such an *overview as an information tool itself*, this summary has been used as informative background for two decentralised seminars. They have been organised in Warsaw and Paris with the regional trade union organisations in April 2007. Moreover, the exchanges occurred in those occasions provided some examples of mobilisation of the national trade union organisations: some good policy practice examples at national level have emerged, as well as targeted recommendations on the paths to follow also in the drawing of the general guidelines. Therefore, during the two seminars, on the base of the information results of the questionnaire and of the testimonies emerged, it has been possible to draw some political guidelines for the trade unions' action in the context of the demographic change.

The guidelines have been further discussed within ETUC and they have been discussed again and eventually finalised in a joint seminar in July 2007 at the presence of all the representatives of the trade union organisations involved.

The “*10 avenues for trade union action: measures to be implemented to tackle the demographic challenge on the labour market*” represent the final outcome of the project, and embody the policy practice we are analysing here.

The guidelines for trade unions, as well as the questionnaire, the national testimonies of good practices and recommendations, the overview of the situation assessed have been published in a report, which therefore provides different information under different angles. The report is available on the ETUC website (http://www.etuc.org/IMG/pdf_pdf_DemogrEN.pdf), and paper copies have been distributed as well.

We can analyse the different tools and relative outcomes of their use separately.

First of all, the trade unions organisations have been addressed a *questionnaire*, in order to assess the situation of young workers and older workers in the different Member states. The questionnaire has regarded both the general policies implemented by the public authorities, and the actions taken by the social partners. The questionnaire represent the main tool used in this action, and the results of the inquiry carried through it have been organised into specific derived information tools.

The first part of the questionnaire was aimed at the assessment of the situation for young workers (under 25 years old) and older workers (55 -64 years old), with regards to sociological, economical and legislative aspects. Therefore the respondent were asked to provide information regarding the legal school leaving age, the average age at which workers enter the labour market, the average salary earned by young workers, the existence of a special minimum wage for young workers, the percentage of the minimum wage that this might represent, where existing, the provision of any type of special benefit for young people (autonomy allowance), the sectors employing the most young workers. Specific questions on

the situation of older workers regarded the legal retirement age, the actual average retirement age, the average salary earned by older workers, the sectors employing older workers the most.

The second part contained questions on general policies implemented by public authorities concerning young people and older workers. In particular, questions focused on the existence of financial incentives offered for employing young workers, of special employment contracts specifically targeted to them, of financial incentives offered to promote their continuing training, of measures concerning working time arrangements, of job creation policies, and in general of all those actions that the public authorities might have enacted to increase the employment rate of young. With regards to older workers, questions focused on the existence of early retirement systems, on the legislation on invalidity conditions. Other questions regarded the provision of financial incentives offered to keep older workers in the work place, of special employment contracts targeted on them, of measures concerning working time arrangements specific for older workers, or concerning the creation of jobs for them, of promotion of their internal mobility, or to retrain them, and of incentives to promote continuing training.

The last part of the questionnaire was more centred on the activities undertaken by the social partners. The most general approach regarded the level of awareness that the social partners have of the problem of age management in the work place. Other questions are again posed with regards to the young and the older workers: existence of social partners agreements on access to job, working time, job creation, continuing training for young people. On the side of the older workers, questions regarded the awareness of the social partners on the population ageing problem; again, other questions were about existing social partners agreements on keeping older workers in the work place, on working time arrangements (and their contents: working hours, daily / weekly / monthly / annual working time), on jobs creation, on skills transfer, continuing training. In general, questions on existing agreements also required the specification of the level at which the agreements occurred (company / regional / national / sectoral). Other general aspects are touched by the last questions of this section of the questionnaire, regarding the complementarity of the measures undertaken by social partners with the governmental ones, the existence of any specific measure specifically concerning women (the only question in which the gender perspective has explicitly been mentioned). The last question means to investigate whether bargaining between the social partners addresses integration of young people into jobs and efforts to keep older workers in employment at the same time, in an intergenerational perspective, which is specifically what we are trying to investigate here.

As mentioned above, the responses to the questionnaire were analysed and discussed within the two regional seminars. In these occasions some remarkable examples of mobilisation of the national trade union organisations have been underlined, and then reported in the final publication (section “*Testimonies*”). They consist in examples of good policy practices at national level of proactive and fruitful actions undertaken by the social partners, but also in a set of the remarks that the trade unions felt as necessary to be made with respect to some public policies enacted by the national governments. These emerged remarks, as well as targeted recommendations on the paths to follow, found a specific outcome also in the drawing of the general guidelines addressed to the unions themselves. However they already represent alone an interesting contribution, worth to be kept into consideration. In fact the remarks have been moved from the point of view of the trade unions, which share the perspective of intergenerational cohesion, and represent proactive inputs for the national

public policies, which may still be unsatisfying under certain aspects. The good - and less good - policy examples and consequent recommendations witness the commitment of the national trade unions, mobilised in action in a series of objectives on whose ground still much has to be done: to improve the existing incentives measures to youth and aged employment, to improve skills and supporting of young people, to ensure that initiatives are better targeted, to link active employment and training policies, to develop attractive wage policies, to expand mobilisation, to pay more attention to the situation of young people, to combine initiatives by the public authorities and the social partners, to evaluate the policies set in place, to improve the quality of work, to intervene on living and working conditions, to help the change perceptions.

5.2.5 Duration of the action

The project and all the activities have been carried out in 2007.

5.2.6 Results and outcomes of the actions

As mentioned above, a *summary* of the questionnaire replies has been compiled. It offers general information regarding the situation of young and older workers and their main sectors of employment, and other regarding the point of view of the trade unions on the public policies undertaken in favour of the employment of young and older people. But the most interesting part of the report regards the outcomes of the social dialogue, the exchange occurring between organised employees and employers, and finding concrete and proactive outcomes in specific agreements which are normally complementary to the public policies enacted at national level. The first important remark regards the fact that this question of ‘demographics and the labour market’, in other words the management of ageing in the workplace, is indeed an issue which is being tackled, and not only by the public authorities, but also by the social partners. The point is that *the latter have committed themselves to this problem in all the countries*, as a proof of the social dialogue as a successful tool also in this field.

In general, the public measures and those coming out of the social dialogue are often complementary (Belgium, Spain, France, Hungary, the Netherlands, Sweden). Similarly, the measures negotiated relate both to older workers and young people (Belgium, Spain, France, Hungary, the Netherlands).

With regards to the measures implemented by the social partners (social dialogue) to promote the employment of young people, the replies show that many agreements have been concluded, either at national level (I.e. the Czech Republic, Spain, France, Hungary, Portugal, Finland, Romania) or at regional level (i.e. Spain, Italy, Hungary, the Netherlands) and/or sectoral level (Belgium, France, Italy, the Netherlands, Sweden, Romania) on young people’s access to employment. In Hungary and France, too, ‘professionalisation contracts’ have been concluded in respect of young workers. In the Czech Republic, Spain, Hungary and Portugal, agreements on working time have been concluded. Measures to do with ongoing training for young people have likewise been negotiated at national level (Spain, France, Hungary, Portugal, Finland, Romania), at sectoral level (Belgium, France, Sweden, Switzerland) or at company level (the Czech Republic, Latvia, Hungary), sometimes with the financial participation of the company (Sweden).

With regards to the agreements concluded between the social partners to promote the employment of older people or aimed at keeping them in work, these agreements relate, for example, to the regulation of working time for older people within the company, whether it be by reductions in hours worked per day (the Netherlands and Portugal) or per week (the Czech Republic, Portugal, Romania) or per month (Belgium, the Netherlands) and/or per year (Belgium, Spain, the Netherlands, Portugal). These agreements have been concluded at national level (Belgium, Spain and France) and/or regional level (France) and/or sectoral level (Belgium, the Netherlands, Portugal). Certain agreements, notably in Belgium, likewise provide financial incentives in the event of the transition to part-time work. Similarly, in Belgium, arrangements are in place with regard to night work by these workers. Agreements have equally been concluded on the transfer of skills between older workers and young workers (Belgium, Spain, France, the Netherlands, Portugal). Likewise, agreements on the training of older workers, in particular in order to keep them in work or to allow them to be retrained in the event of accident or illness, have been concluded at sectoral level (Belgium, France and Portugal) or at company level (the Czech Republic, the Netherlands, Poland and Romania).

Finally, there is certainly one point on which the social partners will need to be vigilant, and that is the taking into account of the specific needs of women, notably keeping them on the labour market and/or getting them back on to it

- when they are young and they have children
- and when they are older or are returning to the labour market later on (perhaps after having brought up their children).

The point is that aside from two countries (the Czech Republic and France), there are no specific measures in place for them.

Of course much still remains to be done to achieve consolidated, strong results, and this is the reason behind the list of 10 avenues for action, which the participants at the final seminar in Brussels agreed upon, resulting from the two previous debates.

The “10 avenues for trade union action” represent the final product of the project, and embody the present policy practice. They consist in recommendations on measures to be implemented to tackle the demographic challenge on the labour market, and even if they are specifically addressed to trade unions, they are meant to be kept into consideration also by the employers organisations. In particular, the role of the trade unions should be to promote them through the actions of social dialogue and in their revendication activities in favour of the workers, but they should also promote them at governmental level, as far as possible, for examples in tripartite concertation, or trying to sensibilise the national political actors towards a more responsible policy making.

The guidelines are target to several objectives: raising of employment rate; making a commitment to the quality of work; developing measures to act as incentives for quality employment; ensuring a match between training and the labour market; squaring individualised responses and integrated policies; redesigning early retirement systems; ensuring the joint mobilisation of the public authorities and the social partners; targeting the concrete measure; imposing evaluation; transforming the demographic trends into opportunities.

The main trend funding the guidelines is the try to move beyond piecemeal responses but also to deliver, in the framework of *integrated* policies, responses which take account of individual needs and expectations – those of young people, older people or elderly people who do not fall into homogeneous groups. Another necessity is considered to be the promotion of ‘active’ family policies – by developing accessible, high-quality support structures for children and/or dependants or by developing personal services – rather than passive ones – by developing or giving priority to expanding the ‘allowances’ paid to families so as to allow a balance to be struck between family, personal and professional life. As a general measure, the idea would be to accompany the return to work, for example for women who have taken career breaks, for people who have been unemployed for longer periods, for older staff, etc, by introducing, as part of lifelong training, skills assessments, professional career guidance, personalised training courses and individual support.

All this, in the view of changing mindsets, in particular with regard to women and young people, as well as older workers who must no longer be viewed as a burden but as a precious resource and an opportunity, in particular by valuing and using their skills and their experience.

6. EQUAL: the working life cycle and the challenge of age diversity

Within the **financing Community initiative EQUAL**, the transnational Development Partnerships, who profited of the funds, tackled a series of topics connected to the intergenerational perspective as it has been framed so far along the description of the previous policy practices. Several initiatives have been undertaken at local level in the different thematic fields, and some of them have treated intergenerational issues. In particular the intergenerational dimension comes into interests in those actions specifically referred to the fields of *adaptability*, and *equal opportunities*. In particular EQUAL has financed projects developing new ways of **approaching age management** and at **supporting the intergenerational learning to balance the workplace**, in the view of a multidimensional, holistic approach towards age, drawn upon a variety of methods and comprising several facets. Within another thematic field, good practices have been individuated with regards to equal opportunities for women and men; in particular as far as **gender equality and reconciling family and professional life** are concerned.

Our aim here does not consist in reporting the series of local projects developed along these thematic lines. But from the different experiences, it have been possible to draw overall “lessons” which can be valid at European level, that has been transposed and disseminated under the form of policy briefs. We selected those, which mostly respond to the scope of SPReW, as reflecting more strictly the intergenerational approach.

In order to provide a specific description of the outcomes of the community initiative connected to the core of our analysis, we will provide a general description of EQUAL and the information useful to frame its general objectives and its way of working. In fact, the community initiative itself, insofar contemplating certain issues, represents a good policy practice. EQUAL has acted as a testing ground to develop and disseminate new ways of delivering employment policies in order to combat all sorts of discrimination and inequality experienced by those seeking access to the labour market and those already within it. The

particular needs of asylum seekers have also been addressed taking into account their specific situation. Then, in the section dedicated to *tools*, we will report the *overview at European level* of the activities enacted and of the objectives pursued by the different transnational development partnerships at regional and local level and of the policy outcomes related to them.

6.1 General presentation

The Community Initiative EQUAL, concerning transnational co-operation to promote new means of combating all forms of discrimination and inequalities in connection with the labour market, funded, in the form of European Social Fund grants, activities aimed at translating the European Employment Strategy into action at the local and regional level, in urban and rural districts - that is to say at the level of territories able to generate local co-operation.

EQUAL co-financed activities in all EU Member States. It was different from the European Social Fund mainstream programmes in its functioning as a *laboratory* – following a principle of innovation - and in its emphasis on *active co-operation* between Member States. Two calls for proposals for EQUAL projects in the Member States have taken place, the first one in 2001 until 2003, the second one in 2004, concluded in 2007. Responsibility for the implementation of the Community Initiative programmes in the Member States lied with the national authorities.

The employment guidelines set the thematic fields on which the actions financed by EQUAL have been based on: they correspond to the four pillars of Employability, Entrepreneurship, Adaptability, and Equal Opportunities. EQUAL finds therefore its place within the Community integrated strategy to combat discrimination based on sex, racial or ethnic origin, religion or belief, disability, *age* or sexual orientation, and social exclusion. Focusing on the labour market, EQUAL has been part of that strategy. It has been complementary to other policies, instruments and actions developed in this respects which go beyond the labour market area: in particular, the specific legislation and action programmes under Articles 13 and 137 of the Treaty. EQUAL, therefore, played a key role in linking together the EU actions supported by the Treaty, the ESF supported programmes and the political objectives pursued in the framework of the European Employment Strategy.

As mentioned above, EQUAL has operated in a number of thematic fields, defined in the context of the four pillars of the employment strategy (Employability, Entrepreneurship, Adaptability, and Equal Opportunities) and following discussion with the Member States. These are the priority fields where groups of Member States considered that transnational co-operation could assist them in improving ways of delivering their national policies.

In order to contribute innovative approaches to labour market policies, the first round of EQUAL (2001-2004) operated in the four thematic fields, defined in the context of the employment strategy – working as measures and priorities of the programmes respectively. Since then, the EES has been revised placing emphasis on objectives, priorities and targets whilst still retaining the overarching objective for the next decade of becoming the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion. Thus the second round of EQUAL (2004-2007) continued the thematic approach established in the first round with the objective of benefiting those subject to the main forms of discrimination (based on sex, racial or ethnic origin, religion or belief, disability, age or sexual orientation) and

inequality. Each thematic field is fully accessible to all such groups. In accordance with the EC regulation, the promotion of equality between women and men is integral to all thematic fields as well as being targeted through specific actions.

Therefore the thematic pillars referred to the EES has been specified to the ends of EQUAL into nine areas of intervention:

- Facilitating access and return to the labour market for those who have difficulty in being integrated or re-integrated into a labour market which must be open to all
- Combating racism and xenophobia in relation to the labour market
- Opening up the business creation process to all by providing the tools required for setting up in business and for the identification and exploitation of new possibilities for creating employment in urban and rural areas
- Strengthening the social economy (the third sector), in particular the services of interest to the community, with a focus on improving the quality of jobs
- Promoting lifelong learning and inclusive work practices which encourage the recruitment and retention of those suffering discrimination and inequality in connection with the labour market
- Supporting the adaptability of firms and employees to structural economic change and the use of information technology and other new technologies
- Reconciling family and professional life, as well as the re integration of men and women who have left the labour market, by developing more flexible and effective forms of work organisation and support services
- Reducing gender gaps and supporting job desegregation
- Supporting the social and vocational integration of Asylum Seekers.

EQUAL has been implemented by partnerships established at geographical or sectoral level and called Development Partnerships (DPs). The partners within the DPs defined and agreed a strategy to be followed, along with the means of bringing it to fruition using innovative approaches. DPs undertook transnational co-operation and participated in the dissemination and mainstreaming of good practices.

Transnationality has been a distinctive characteristic of the community initiative in question. Co-operation across Member States and the experience gained under the two rounds show that considerable policy innovation can be achieved through transnational collaboration. In EQUAL, it has been present at a number of levels. It allowed a better and wider insight into the nature and forms of discrimination, inequality, and labour market exclusion; it brought to improved strategies and actions in the light of experience in other Member States (at national as well as at Development Partnership level); it helped in delivering benchmark strategies and actions across several Member States; it strengthened the credibility to the work carried out by Development Partnerships as far as opinion leaders and decision-makers are concerned. Transnational co-operation has been the intrinsic feature to the implementation of EQUAL: it bonded together Development Partnerships from several Member States through their common work programmes. To achieve results, transnational cooperation required sharing a common approach to tackle specific problems, develop similar and/or complementary strategies, approaches and objectives, and agree on priorities for joint actions. Development

Partnerships based their common work on their knowledge and experience. The joint activities were organised in such a way as to achieve a significant added value for the strategies and work plans of each Development Partnership.

Innovation has been another main feature. In fact EQUAL tested innovative approaches towards a greater effectiveness of policy delivery. These might be completely new approaches, or might be due to the transfer of elements from elsewhere. The second round of EQUAL continued experimenting new ideas: it was also important that the innovations in the first round of EQUAL informed the second round which has been built upon. In addition, the specific needs of the labour market in Member States might not have been fully addressed in the first round, and/or good practices might have been developed in another Member State with similar situations of discrimination. Therefore, in the calls for proposals in the second round, specific innovation needs addressing relevant or emerging issues of the labour market, and a redesign of interfaces between institutions or public policies and actions, might be identified by Member States. Member States also articulated policy demand and encouraged Development Partnerships to experiment more in areas of protection against unemployment, quality of employment, and direct job creation.

6.2 Initiator and target groups

Initiator: the European Commission, on mandate of the Council, following the rules valid for the structural funds and in particular the European Social Fund.

Target groups: the Community initiative EQUAL, as framed within the European Social Fund, was specifically addressed to those subjects who can apply for these kind of funding, namely regions and other subjects acting in direct connection to the territory within the European Union. In particular, the beneficiaries of the funds have been individuated in Development Partnerships, groups of subjects of different nature, formed on a transnational base.

6.3 Tools

6.3.1 Overview

The policy tools adopted at European level in order to deeply exploit the outcomes of the various activities carried out by the transnational Development Partnerships and the Transnational Partnership (TCA), enacted among different DPS, are several, and some of them still have to be launched, in connection with the partly still ongoing process of evaluation.

Mainstreaming the integration and incorporation of new ideas and approaches into policy and practice, is challenging. To assist in this process, EQUAL provided structures and tools, but ultimately it has been up to each Development Partnership, each Member State and the European Commission to provide **evidence for effective, efficient and relevant alternatives in the delivery of inclusive labour market policies that can be transferable** across Europe and applicable on a larger scale. These activities were meant not be limited to dissemination of results, which was considered as only one step in the process of mainstreaming.

In order to obtain the maximum impact from EQUAL, results have been analysed, benchmarked and disseminated in order to have an impact both within Member States and across the Union. As with any experiment in a laboratory, the effects of an experiment must be related to a wider (economic, political, cultural, organisational) context to be sustainable. The results of EQUAL are meant to become part of the systematic approach to other policies and programmes, which are carried out on a local, regional, national and European level. **Publications, leaflets and awareness raising campaigns** have been useful spreading tools as well.

The process of **sharing information** and **exploiting the results** of innovation is at the heart of EQUAL. To achieve this, **networks** structured around a thematic focus have been established in Member States and at European level. These networks brought Development Partnerships together, to discuss and evaluate the most promising practices and outcomes of the work, and to prepare their dissemination and integration into policies and suggestions for further practices. Other actors, from outside the Initiative, such as political decision-makers, researchers, associations, social partners have been implicated in these activities too.

European Thematic Groups co-ordinated thematic activities, while Horizontal Groups focused on learning from the processes of EQUAL. Development Partnerships validated, disseminated and shared their experiences and results both within the framework of national thematic networks and at European level through the European Thematic Groups.

Through technical assistance, both Managing Authorities and the European Commission supported the thematic review process. In particular this included hosting **conferences, seminars** and **working groups** in order to advance the assessment, benchmarking, delivery and implementation of **good practices** from EQUAL. Development Partnerships, as part of their commitment to transnationality and as an integral part of their work programme, participated and contributed to these networks and events (for which participation costs, travel and subsistence, were considered as eligible expenses).

Member States also co-operated in **transnational dialogue**. In a very visible way, they acted as 'lead' Member States for the thematic and horizontal groups i.e. as member of the Steering Group, which was responsible for development, and implementation of the work programme and activities. They also hosted EQUAL events, independently or in collaboration with the European Commission, as well as maintaining direct co-operation between Member States.

EQUAL has contributed to **effective policy making** by finding out, on the ground, what works and what does not, and making sure that all key stakeholders can learn from it. The results are summarised and made public, and are used to enrich the policy peer reviews set up in the context of the European Employment Strategy, the Social Inclusion Process, evaluation activities at Union level, and the dissemination and exchange activities of the Community Programmes under Articles 13 (fight against discrimination) and 137 (in favour of social inclusion) of the Treaty.

In this context, with particular regards to the themes of our interest, we considered in particular some policy "**lesson**" drawn out from the experiences of different DPs, by the **Horizontal groups** focused on learning from the processes of EQUAL. **Policy recommendations and indications** have been summarised and reported on line in order to spread the outcomes of the different experiences and include them in the frame of the European level policy.

The themes that mostly regard our analysis have been approached within EQUAL under the fields of Adaptability and Equal Opportunities.

With regards to the first aspect, "EQUAL @ Work" is the main slogan of EU activities on Adaptability. Those activities are focusing on innovations in learning systems that support access to, as well as progression and retention within, the world of work for various groups including older people, people with disabilities, minority ethnic groups and women.

In particular, within the Adaptability Pillar, challenging *discrimination throughout the working life* has been identified as a thematic priority. This has been the basis for the specific focus on **age management** practices and policies. The Working Groups have supported horizontal and vertical mainstreaming at the European level on the topics outlined. Supporting the dissemination of related good practices is a key priority. Impacting on policy and practice at the European level is another important objective and one where Age Management, as a relatively new approach, can play an important role.

6.3.2 Age Management practices and policies

Age Management relates to a number of key issues within EQUAL's Adaptability themes. There are three reasons why, in the review of thematic priorities, the focus has been placed on Age Management: as a first step, the Development Partnership (DP) and Transnational Partnership (TCA) analyses define their target groups very broadly, which allows reflecting on working life as a whole. Secondly, the most common overall target group is older people/workers. Thirdly, the priorities of the lead member states emphasise the importance of EQUAL's focus on systemic/structural forms of disadvantage and, specifically, the situation faced by older people. The evidence from the DP and TCA analyses showed that those partnerships that do have a specific focus on a target group, are most likely to be focusing on the situation faced by older workers. Older people/workers have represented a key target group for over a third of the Adaptability TCAs, making it the most significant one.

Having specific regards to the **working life cycle**, EQUAL has developed original ways of approaching age management. The EQUAL Development Partnerships (DPs) have taken a multidimensional approach towards age, drawing upon a variety of methods and organisations to provide a holistic approach, which comprises a number of facets.

In the first place, EQUAL looked at the paradoxical attitudes that exist towards age. EQUAL DPs have been highly effective in recognising and responding to the demands and engrained prejudices often held by employers³⁶. On the one hand, older workers are regarded as less productive, more resistant to changes in work organisation, uninterested in training, in particular in new technologies. On the other, they are an asset in terms of experience, which can be passed on to younger generations. On the basis of their practical experience with companies, several DPs³⁷ concluded that age was not a problem in itself, but must be seen in conjunction with other parameters such as seniority in the job, skills or mobility. It could, however, become a problem area if combined with a lack of skills, disability or health problems.

36. Alliance for Work, Poland

37. Equality DP, France; The Power of the Experienced DP, Finland; RE-IN+45 DP, Belgium; Offensive fur ältere Arbeitslose DP, Germany; TRED DP, Ireland; STARH Transnational Partnership (TP); MERITE, France; GENERA DP, Germany;

Lifelong human resource management also involves consideration of occupational health and safety. A way to prevent accidents is to target groups of workers, and focus on informing them about job-related risks. DPs have done this by feeding back information gathered by a team of relevant stakeholders, including the workers themselves³⁸.

Employers were involved in all DPs seeking to change the image of older workers, using mediators and consultants to act as a bridge between managers and employees. There was extensive involvement of regional social partners in several countries. All partnerships devoted considerable time to individual interviews with employers and group discussions brought together employers and employees. Partnerships experimenting with the tutoring scheme unanimously agreed that ongoing dialogue between management, the consultant and the older workers was essential to the success of the initiative. In the field of health and safety, occupational physicians, ergonomists and researchers became involved. And, finally, the individual workers themselves were involved in the process through personalised support, assessment of training needs, validation of informal skills or group work. This wide range of perspectives has challenged and enriched the design of many of the possible solutions highlighted above.

Final **policy recommendations** have been drawn. The first lesson turned out to be that managing age requires an *integrated* approach involving action in a whole range of areas, such as changing perception of age, taking account of the entire working life cycle, health and safety and promoting links between generations. Age management spreads across all age groups and means looking at creating good working conditions during the entire life cycle. When the use of the workforce is maximised, this leads to a "win-win" situation for the company and individual workers. Managing the effects of an aging workforce is a shared responsibility, which must involve all relevant stakeholders: state, work organisations, social partners, and individuals.

Therefore, Governments are invited to use the EQUAL experience when establishing their national employment plans and when putting in place a legislative, financial and tax framework, which will guarantee a real integrated active ageing strategy. Making more use of existing networks that have been created to share information and experience between Member States, for example, would support the implementation of the EES guidelines. Promoting long-term and integrated approaches to the challenges posed by an aging population - involving a wide range of stakeholder organisations, including businesses - is also very important. Governments are then called at placing particular emphasis on engaging and raising the awareness of employers in age management interventions. Promoting the lifecycle approach to work, whereby younger as well as older workers are taken into account, for example through intergenerational learning, can prove very effective in this context.

Enterprises are invited to see age management as an integral part of the company's human resource management and as an aspect of managing diversity, age being one of various criteria (sex, qualifications, etc.). They are therefore called at taking into account age considerations very early, as a preventive measure, using tools and approaches such as the promotion of access to training, the development of lifelong learning strategies and workplace training for older workers, career assessments, annual interviews, validation of skills and experience, interviews at key career points, new forms of work organisation, including

38. For example, Advise (Spain) and Neorion II (Greece)

improving health and safety, to keep employees in good health for as long as possible in the company.

The social partners are invited to take a very pro-active role in the effective design and implementation of employment measures by working with national governments. They are in particular called at working with national governments to combat negative stereotypes and promote age positive practices amongst employers.

Last, but not least, individuals are invited to both initiate and participate in this process of change as sharing a certain responsibility for maintaining his or her own employability throughout his or her career. However, any strategy that involves new obligations without recompense for the employee, is doomed to failure. Individuals can help create conditions where both themselves and employers benefit ("win-win" situation). Intergenerational sharing can only be achieved if young workers are open to learning from older more experienced colleagues and if older workers realise the potential of new technologies and the knowledge their younger colleagues can share.

Having specific regards to age management, within the pillar of Adaptability, EQUAL has also supported a series of actions aimed at increasing the **intergenerational learning** as a way to balance the workplace. The European Working Group in charge of summarising and spreading the outcomes of the projects, underlined that a good policy approach to age management is represented by the practice to share skills and knowledge across generations. Also with respect of what has been said above with regards to prejudices that can affect a correct approach to age management, EQUAL has addressed failure of some human resource managers to create quality jobs or to enable and inspire workers to work for longer, regardless of age, gender, disability etc.. The key has been a shift in focus from age to valuing skills, knowledge and personal abilities.

The activities addressed and financed under the EQUAL guidelines worked on changing the belief that older workers are too old for the work they do and the sectors in which they work. Through its activities on changing attitudes and perceptions in this field, it has realised that age is a relative concept and must be regarded in combination with other aspects such as health, gender, disability, race and seniority³⁹. If attitudes focus on skills and diversity of the workforce, age becomes less of an issue⁴⁰. The innovative activities of EQUAL increased awareness that all workers possess skills and these may be exchanged through intergenerational learning to benefit both individuals and the company. The transfer of knowledge and know-how to younger workers means that it is not lost when older workers retire⁴¹. Simultaneously, older workers are better able to keep up with developments by learning new techniques and other skills from younger workers. This process⁴² also reduces the intergenerational gap.

39. Paradox DP

40. TRED (IE-14) Ireland

41. FOREM - Tutorat mode d'emploi (BEfr-19) Belgium

42. Atout Age Lifelong Human Resources (FR-PCH-2001-10839) France , Vers des entreprises pour tous les âges (FR-IDF-2001-11082), France , Adaptation professionnelle des travailleurs âgés et transmission des connaissances (FR-AUV-2001-10974), France, Ages et Travail dans le Bâtiment Travaux Publics (FR-NAT-2001-10381), France, Didactt, Dispositif d'activation des compétences transversales et tutorales (FR-

EQUAL has also experimented with introducing trainers/co-coordinators for intergenerational learning. Diversity approach models to human resource management, developed and tested in several Member States, showed that a precondition for successful intergenerational learning is that all stakeholders work together with the same goal in mind.

Existing approaches and original ones enable intergenerational learning in the EU. Employers need to choose which tools to use, depending on the particular sector, the company size, the context and culture as well as the national legal framework.

For example, *in-depth self-assessment to capture tacit knowledge* brings greater awareness of the worker's own skills and this has an empowering effect.

A *learning platform*, a sort of discussion forum, has been established by EQUAL where newcomers and older workers exchange and transfer their knowledge and experience in order to evaluate global solutions for training and work organisation. This way, businesses develop a capital of transferable competencies, which are recognised and valued. The platform or competence network between the new and senior employees allows the recognition, value and transfer of knowledge in-house.

Coaching of older workers has helped them express their ideas and views on possible solutions to their employer. Based on dialogue, coaching sessions have been developed for mentors to reflect their tacit knowledge and to transfer it to the younger generation. This has proved to be empowering and has led to an increase in job satisfaction, as the older workers felt that their experience mattered and that they were being listened to and taken seriously.

Tutoring and mentoring models have been developed in several European countries as a way to support the flow of knowledge between older and younger workers. EQUAL in certain countries, for instance, has demonstrated the advantages of a model that emphasises the move away from the traditional one-way learning. Instead, it showed that an empowering two-way intergenerational learning process could take place where the parties learn from each other. Tutoring has also been successfully applied to focus on the validation of learning and to help develop "a second career" by defining future job aspirations and linking them to appropriate trainings. It proved that the tutor role works best when it is not seen as an extra task, but as an integral and necessary part of the employer's practices. It is also important that the tutor role is flexible and adapted to the actual people and circumstances involved.

Rethinking information and communication channels can increase the flow and the quality of exchange between workers and generations of workers. In some countries, EQUAL developed multimedia working groups adapted to the older workforce. These groups allowed workers to identify key competences for a job and further training that could help them adapt to new technologies or define a new career. Elsewhere, EQUAL found that virtual information sharing can be used to set up platforms encouraging interaction with older people, develop virtual spaces for interactive demonstrations of ICT applications and create multimedia tools for the self-diagnosis of ICT training and adaptation needs.

EQUAL has also helped to develop an overarching approach that works with several different partners at all levels in order to find solutions for companies, job agencies and local

organisation. This approach has helped to motivate companies and older workers to re-enter the labour market through skills assessments, adjustments of work organisation, and positive communication stressing the competencies gained through experience. It can be reported that international cooperation allows for transferring good practices into new cultural contexts because it is clearer, against the cultural differences, which conditions need to be met in order to put a specific system into place.

Policy recommendations spread through the web site and other tools, as for the other thematic areas, move from the achievement that intergenerational learning is a "win-win" situation for workers, companies and the economy. Employees learn to value their own skills by exchanging them and become motivated to develop their careers and work for longer. Employers benefit from better motivated and more efficient staff that apply all their skills within the company. Improved awareness of existing skills enables efficient investment in skill development that can promote competitive advantages to the benefit of the company and the growth of the economy.

Key messages from the EQUAL experience include EU institutions, national governments, social partners and key actors at local and regional levels, who should work together to reinforce the focus on skills, tacit knowledge and the benefits of intergenerational exchanges and away from *age*. In particular, Member States, Employers and Social Partners could make use of the EQUAL experiences by creating an intergenerational pact. Governments can exploit them by formulating and supporting strategies for intergenerational learning. Social partners should take the initiative to develop networks and raise awareness of the benefits of intergenerational learning, and the different techniques available to value, exchange and transfer knowledge.

Employers could profit of the results achieved through EQUAL developing strategies for intergenerational learning within their companies with the help of social partners and training networks, making use of the whole internal capital of knowledge, reducing this way training costs and early retirements as well as the risk of workforce shortages.

The second pillar in which we can find the way EQUAL has faced another interesting theme is the one regarding Equal Opportunities. It represents one of the fields in which the activities and the projects funded have been more prolific. The particular aspect that we treat here regards the **reconciliation of work and family life**. What is interesting for our scope is that in this respect the results achieved through EQUAL not only regard women and their role of mothers. The transferability of certain experienced models, initially targeted to them, allows to affirm that certain policy practices can also be valid in different circumstances, for instance for older workers approaching retirement. This example brings the approach to the **equal opportunities related policies out of the traditional burdens of the gender situation, and connotes it also in an intergenerational perspective**.

6.3.3 Improving the work-life-balance of women and men

The dilemma of *holding a job and having a life* has been tackled through several initiatives all over Europe, under different forms, the overall purpose being to create and promote a "European Model of Comprehensive Approaches to Equal Opportunities".

EQUAL has developed good practices that made a visible difference for women and men who want both gainful employment and career, and a more satisfying family and personal life.

Comprehensive work-life-balance policies enabled cultural change in companies and organisations that have committed themselves to implementing new flexible work organisation and various family support services.

Many companies, and particularly SMEs, shy away from work-life-balance policies because they assume they cannot afford the costs. To overcome the reticence of employers EQUAL partnerships have been collecting and studying a large body of success stories from throughout Europe. Those good practices are clearly indicating that employers can gain substantially through work-life-balance packages. Hard facts such as presented in the following example proved to be a driving force for companies to introduce family-friendly personnel policies.

A careful analysis of employees' and employers' needs in terms of working time flexibility, enabled EQUAL partners in all Member States to design and test a variety of different solutions. Companies have been supported in introducing full-time hours over four days, periodic home working and telework, combinations of long and short days and working longer hours over a defined period to accrue non-working blocks of time. Those banked hours could for instance be used during schools holidays or family emergencies. Results were very satisfying, especially for female employees. Mothers appreciated the general reduction of stress and also the opportunity to balance working time and childcare provision better, and to spend more quality time with their children and partners. Employers came to recognise that both job performance and productivity increased.

In some cases the experience facilitated the transfer of those models to **other target groups**. What began as pilots for parents is increasingly becoming regular practice benefiting other categories of staff. Good practices targeted to women then convinced employers to give older employees the choice of phasing out of gainful employment through flexible work arrangements. This includes gradual retirement packages offering the option to work part-time for two years prior to retirement (2, 3 or 4 days a week). Along with this, the employee's pension contributions are paid in full. Thus upon retirement, the employees receive their full pension benefits, which is particularly important for women. The approach helped enterprises to meet the emerging skills gaps due to demographic change and to transfer the knowledge and skills of older workers to the next generation.

In some Member States, EQUAL managed to change atypical working patterns that severely hampered reconciliation.

Lack of affordable and flexible care for children and other dependants is a major barrier to balancing work and family life in many Member States. EQUAL partners solicited the financial support of employers to establish or improve care services for their employees. Another successful approach to meeting family needs while at the same time helping companies attract and retain qualified staff was the introduction of "help desks for family matters", based in companies or local authorities.

In some countries, work-life-balance programmes as described above were only the beginning of a long-term process of change. Milestones are already visible and indicating lasting impact. To enable all partners to embark on this "continuum of change", EQUAL established a Work-Life-Balance Group in each of the participating organisations. The groups involved representatives of management and trade unions who diagnosed the work-life-balance provisions of the company. The following step was to apply the work-life-balance criteria that

are based on research and good practices collected earlier and to identify the stage of the continuum from which to start moving. Diagnostic checklists produced by the partnership successfully assisted the organisations during this evolutionary process. All partners agreed that cultural change was well underway and that their organisations looked considerably different than at the beginning of the endeavour.

On the side of the **policy recommendation**, it is possible to affirm that, to secure productivity and competitiveness in Europe, enterprises must become more flexible to respond to sudden changes for their goods and services and to the increasing demand for quality which is related to workers family needs and personal preferences. It is paramount that stakeholders perceive work-life-balance as a concept that is targeting both women and men.

Employers are encouraged to build on EQUAL good practices and to make use of the large variety of business cases, diagnostic tools and support materials. Yet, they are not the only players when it comes to take action. Their willingness to embrace change, social responsibility and gender equality as part of personnel policies should be enhanced by appropriate strategies of other key actors.

Social Partner Organisations should integrate work-life-balance in the process of collective bargaining. This requires awareness raising and training of those involved in the negotiation of collective agreements at company, sectoral or regional level.

Local and Regional Governments should play a more pro-active role and initiate territorial alliances for work-life-balance. This is particularly relevant for SMEs, which often lack the resources to develop such policies of their own.

National Governments and Legislators should review the existing legal framework and consider amendments to remove obstacles to and raise the attractiveness of flexible work arrangements for employers and employees.

6.4 Duration of the action

Two calls for proposals for EQUAL projects in the Member States have taken place, the first one in 2001 until 2003, the second one in 2004, concluded in 2007. Actions promoted in 2007 are still ongoing for the duration of 2008.

6.5 General feedback of EQUAL

The evaluation of EQUAL is carried out in the framework of the European Social Fund regulation, following the guidelines given for all the Structural Funds. Evaluation is a guarantee of progress, accountability and effectiveness of European programmes and funds. It runs at project, local, regional, national and Europe-wide levels.

At the level of the *project* (Development Partnership), insofar that they have to set up an evaluation process whose results must be presented to the national managing authority, itself in charge of the global analysis of all the projects auto-evaluations; at *national* level, on the basis of a contract established after a call for tender launched by the managing authority with professional and independent evaluators (the annual evaluation reports, transmitted to the Commission, follow common specifications included in the national programmes); at *European* level, on the basis of a contract established after a call for tender launched by the

European Commission with professional and independent evaluators, who extract the essential facts from the national evaluations and carry out their own research on the basis of specific terms of reference.

The period foreseen by the regulations for the evaluations is now over. The intermediary and 'final' evaluations, compulsory at regulatory level – covering the EQUAL activities between 2001 and early 2006 – have been closed and the reports requested at national and European level are completed and available on line. The evaluation work is nevertheless still ongoing in two ways: several evaluations are still formally being done on the basis of standard terms of reference, notably in the new Member States; on the basis of a voluntary consensus, reflected in a guidance document specifying the evaluation tasks that should ideally be partially or totally carried out by the Member States until the end of the activities in 2008.

Positive results have been achieved under the two rounds of EQUAL. The overall assessment of the first round results has been almost completed, and the second round is still under analysis. However, the outcomes of the analysis carried out so far show that the transnational cooperation projects have produced a better insight into the nature and forms of discrimination, inequality, and labour market exclusion; improved strategies and actions in the light of experience in other Member States (at national as well as at Development Partnership level); benchmark strategies and actions across several Member States; credibility to the work carried out by Development Partnership as far as opinion leaders and decision-makers are concerned.

7. Education and motivation: validation of formal and non-formal skills

As we had the opportunity to mention above, on the ground of **education**, the Lisbon Strategy and the EES foresee that, in general, education through all the course of life should offer learning and training opportunities tailored to target groups at different stages of their lives: young people, unemployed adults and those in employment who are at risk of seeing their skills overtaken by rapid change. These overall statements have been translated in a series of initiatives in order to provide, for example, IT education to older workers, a higher level of formal education to the young, and other activities which are targeted to specific age groups of workers. What we try to analyse here is indeed a particular aspect of the Life Long Learning strategy, which, under a certain point of view, does not really represent a part of the learning process, to be granted to all the subjects involved, or potentially involved into the labour market, along all the course of their lives. The feature in question finds a *collateral* place with respect to this learning process, and constitutes a useful complement of it. Assumed that learning is an activity which has to be carried on in a life long perspective, the skills which all workers and potential workers are meant to acquire might not only descend from “formal” learning and education processes. Considering the acquirement of skills as a factual element, the level of knowledge, intended in the broader sense, can also be acquired through the experience gained along the working life. This happening needs to be framed and recognised, as informal learning, descending from experience and not formal or not validated educational paths, has to be taken into serious account. The problem arises when there are no provisions of validation of the non-formal skills. This is the reason why the European level policy making in the field of education has foreseen paths for the *validation of non-formal learning*, which “refers to the process of assessing and recognising a wide range of skills and

competences which people develop through their lives and in different contexts, for example through education, work and leisure activities”⁴³. The issue assumes importance also in a generational perspective, as far as the trend of the last years has been in the sense of increasing the acquisition of skills through formal education and training. Therefore, when it is difficult to recognise the different level of knowledge of workers of different ages, it might be encountered the situation in which opposition between the diploma of the young employees and the experience of the older ones is registered. In order to smooth the tensions and foster better intergenerational integration, giving a diploma to the older workers can facilitate mutual recognition.

7.1 General presentation

Non-formal skills are normally widely underestimated, or lack recognition, in contrast to formal training. When employees and employers are unaware of employees' informal skills, both employees and businesses remain underdeveloped. Employees with low self-esteem, particularly low-skilled ones, undervalue their own level of knowledge. This dis-empowers them and leads to low career aspirations and to a lack of personal recognition. They become reluctant to access training, thinking they are 'too stupid to learn'. Consequently they stay low-skilled and risk exclusion and marginalisation in the labour market. Employers also tend to be unaware of the tacit skills of their employees. This leads to less rational and cost-effective decisions on training and development of the human capital within the company. The workforce and the company become less competitive and this impacts negatively on the economy.

Validation of existing skills including non-formal ones and workplace learning is widely supported in European policy and practice because it brings tangible benefits to employees, employers, social partners, the economy and Europe as a whole. It is also part of the strategy to prevent discrimination and social exclusion of disadvantaged people who are least likely to access training.

Validation of existing skills is recognised in the European policy framework as a good tool to help all individuals become equipped with the skills required for a modern workforce in a knowledge-based society, permit their career development, reduce skills mismatch, labour shortages and bottlenecks, empower disadvantaged groups and promote integration into the society.

This particular aspect has been developed also at the level of the **Life Long Learning programmes**, and, more in particular, by the “**Education and training 2010**” integrated programme supporting the implementation of the Lisbon Strategy in the fields of education and training.

7.2 Policy tools

The need for common guiding principles for validation have been stated repeatedly in recent years, most significantly in the conclusions of the **European conference on validation of non-formal and informal learning** in Oslo May 2002. The 31 Ministers of Education and

43. Making learning visible: Identification assessment and recognition of non-formal learning in Europe, EUR-OP, 2002, Luxembourg.

Training, the social partners and the Commission, in the **Copenhagen Declaration** of November 2002, established the aim of developing a set of common principles at European level for validation of non-formal and informal learning to ensure greater compatibility between approaches in different countries and at different levels, thereby adding value to work at local, regional and national level.

The Copenhagen agreement reflects the increasing political attention given to learning taking place outside formal education and training institutions. During the following couple of years a number of initiatives have been undertaken at national and European level supporting the development of new approaches to validation of non-formal and informal learning. In the **Communication on Lifelong Learning** (November 2001) **‘Valuing Learning’** is a main priority, emphasised by the need for mutual learning in Europe. The same attention to non-formal and informal learning can be observed in the 2001 (Education) **Council decision ‘Concrete future objectives for European education and training systems’** and in the **White Paper on Youth policies** adopted by the Commission Spring 2002. Under the **Future Objectives** work programmes; developing ways for the official validation of non-formal learning experiences has been identified as a key issue in making learning more attractive and relevant for the individual. This political emphasis has been further strengthened by a **Norwegian/Irish** initiative to organise an **informal ministerial conference** on this subject in June 2004. This conference has been instrumental in promoting common principles for validation. These initiatives reflect the very strong political *momentum* existing in this particular field.

The same intentions are affirmed in the **Joint Interim Report of February 2004**⁴⁴, within the framework of the “ **Education and Training 2010** “, the integrated programme supporting the implementation of the Lisbon strategy in the fields of education and training.

In general, the 2004 Joint Report underlines a need for coherent and comprehensive national lifelong learning strategies. In this context, it finds necessary to promote more effective partnerships between key actors including business, the social partners and education institutions at all levels. “The development of common European references and principles can usefully support national policies. Although such common references and principles do not create obligations for Member States, they contribute to developing mutual trust between the key players and encouraging reform. These common references and principles are being developed with regard to a number of major aspects of lifelong learning as part of the implementation of the work programme of the objectives of education and training systems and of the Copenhagen Declaration”.

In particular, these strategies should include the *validation of prior learning*, and the creation of learning environments that are open, attractive and accessible to everyone, especially to disadvantaged groups. Common European references and principles should be developed as a matter of priority and implemented according to national situations, and within Member States competences.

The Report assessed that the diversity and specificity of vocational education and training systems and provisions in Europe present particular challenges in relation to transparency, quality and recognition of competences and qualifications. It therefore stated that a draft set of

44. http://ec.europa.eu/education/policies/2010/doc/jir_council_final.pdf

common European principles *also* for the validation of non-formal and informal learning had also been developed.

The principles stated in the Copenhagen Declaration were adopted in May 2004 also in the Conclusions of the Council and of the representatives of the Governments of the Member States meeting within the **Council on Common European Principles for the identification and validation of non-formal and informal learning**⁴⁵, setting out the individual's entitlements, obligations of stakeholders and general for validation systems.

In its conclusions, the Council stressed that Common European principles are necessary to encourage and guide the development of high quality, trustworthy approaches and systems for the identification and validation of non-formal and informal learning. They ensure the comparability and wide acceptance of different approaches and systems in the Member States, and also enable the transfer and acceptance of all learning outcomes across different settings. They take particular account of the needs and entitlements of individuals.

Common European principles have been addressed to the Member States, the Commission and stakeholders who are engaged in the identification and validation of non-formal and informal learning. They are to be applied on a voluntary basis, in full respect the rights, responsibilities and competences of the Member States and stakeholders. They inform the development of systems and approaches to identification and validation and do not prescribe any particular approach or system.

The principles are set out under main headings:

- *Individual entitlements*: the identification and validation of non-formal and informal learning should, in principle, be a voluntary matter for the individual. There should be equal access and equal and fair treatment for all individuals. The privacy and rights of the individual are to be respected.
- *Obligations of stakeholders*: stakeholders should establish, in accordance with their rights, responsibilities and competences, systems and approaches for the identification and validation of non-formal and informal learning. These should include appropriate quality assurance mechanisms. Stakeholders should provide guidance, counselling and information about these systems and approaches to individuals.
- *Confidence and trust*: the processes, procedures and criteria for the identification and validation of non-formal and informal learning must be fair, transparent and underpinned by quality assurance mechanisms.
- *Credibility and legitimacy*: systems and approaches for the identification and validation of non-formal and informal learning should respect the legitimate interests and ensure the balanced participation of the relevant stakeholders.

The process of assessment should be impartial and mechanisms should be put in place to avoid any conflict of interest. The professional competence of those who carry out assessment should also be assured.

45. http://ec.europa.eu/education/policies/2010/doc/validation2004_en.pdf

Therefore, the Council invited the Member States and the Commission, within their respective competencies and the open method of coordination, to disseminate and promote the use of the common European principles. It also stressed the need to encourage the European social partners, in the context of social dialogue, for the specific needs of the workplace, and non-governmental organisations engaged in providing lifelong learning opportunities to use and adapt the common European principles as appropriate.

The Council supported the exchange of experiences and mutual learning including the development of a European Inventory on the identification and validation of non-formal and informal learning, and suggested to strengthen co-operation with international organisations with a view to achieving synergies in this field.

The effectiveness of the above-mentioned principles lies on the necessity to develop and support coherent and comparable ways of presenting the results of the identification and validation of non-formal and informal learning at European level. Therefore the Council invited to consider how the existing instruments in the Europass framework for transparency of qualifications and competences can contribute to this and to consider how the common European principles could support ongoing work on credit transfer and accumulation, quality assurance and guidance and, in general, contribute to the development of a European Qualifications Framework which was called for in the Joint Interim Report of the Commission and Council, February 2004.

Within this policy framework, the validation of non-formal and informal skills, has found other ways of development in the Member States within the abovementioned **“Education and Training 2010”** integrated programme supporting the implementation of the Lisbon strategy in the fields of education and training.

In the light of the Lisbon Strategy, the Union must become the most competitive and dynamic knowledge-based economy in the world capable of sustainable economic growth with more and better jobs and greater social cohesion. To achieve this ambitious goal, Heads of States and Government asked for "not only a radical transformation of the European economy, but also a challenging programme for the modernisation of social welfare and education systems". In 2002, they stated that by 2010, Europe should be the world leader in terms of the quality of its education and training systems. Making this happen means a fundamental transformation of education and training throughout Europe. This process of change has to be carried out in each country according to national contexts and traditions, and driven forward by cooperation between Member States at European level, through the sharing of experiences, working towards common goals and learning from what works best elsewhere (the "open method of co-ordination"⁴⁶). In 2002, the Education Council and the Commission endorsed the 10-year work programme. Approved by the European Council, it constitutes the new and coherent Community strategic framework of co-operation in the fields of education and training. Ministers of education agreed on three major goals to be achieved by 2010 for the benefit of

46. Under the principle of subsidiarity every Member State of the European Union retains full responsibility for the content of teaching and the organisation of its own education system. In accordance with Articles 149 and 150 of the Treaty, the EU's role is to contribute to the development of quality education by encouraging cooperation between Member States and, if necessary, by supporting and supplementing their action. The main purpose of this is to develop the European dimension in education, encourage mobility and promote cooperation between schools and universities. In keeping with these Articles, the European Union therefore does not intend to devise or implement a "common policy" on education. It nevertheless has specific ways of promoting cooperation in this field through action at European level.

the citizens and the EU as a whole: to improve the quality and effectiveness of EU education and training systems; to ensure that they are accessible to all; to open up education and training to the wider world. To achieve these ambitious but realistic goals, they agreed on thirteen specific objectives covering the various types and levels of education and training (formal, *non-formal and informal*) aimed at making a reality of lifelong learning.

Working Groups have been working over the course of the last two years on one or more objectives of the work programme. Gathering experts from 31 European countries as well as stakeholders and interested EU and international organisations, their role has been to support the implementation of the objectives for education and training systems at national level through exchanges of "good practices", study visits, peer reviews, etc. One of the established working groups has been working on the recognition of *non-formal and informal learning*.

The validation of *informal* and *non-formal* skills finds specific measures of implementation within the member states through funding policy initiative as the EU action programme **Leonardo da Vinci** (for vocational training), which stem from a European level co-decision between the Council and the European Parliament. It is framed within the **Lifelong Learning Programme 2007-2013** entered in force in December 2006.

The aim of this new programme is to contribute through lifelong learning to the development of the Community as an advanced knowledge society, with sustainable economic development, more and better jobs and greater social cohesion. It aims to foster interaction, cooperation and mobility between education and training systems within the Community, so that they become a world quality reference.

The Lifelong Learning Programme comprises four sectoral programmes on school education (Comenius), higher education (Erasmus), vocational training (Leonardo da Vinci) and adult education (Grundtvig), and is completed by a transversal programme focusing on policy cooperation, languages, information and communication technology and dissemination and exploitation of results. Finally, a Jean Monnet programme focuses on European integration and support for certain key institutions and associations active in the field. The programme budget will be €6,970 million for the total period 2007-2013.

For each sectoral programme, quantified targets have been set in order to ensure a significant, identifiable and measurable impact for the programme. The target for the Leonardo da Vinci programme is to increase placements in enterprises to 80,000 per year by the end of the programme.

The Commission has published in December 2007 the general Call for Proposals for applications for grants under the programme. In order to promote mobility within the EU, support will be provided for projects ensuring the *quality* of mobility. Projects must, where appropriate, address the following elements:

- Linguistic and cultural preparation;
- Objectives, content and duration of the stay abroad;
- Pedagogical organisation, tutoring and mentoring;
- *Validation of the skills acquired.*

A specific priority of the call for proposals (number 5 of Leonardo da Vinci) is expressively dedicated to the validation of non-formal and informal learning. Under this priority it is remarked that transfer and development of innovation projects should focus particularly on and take into consideration the latest developments of European and/or National Qualification Frameworks: exchanges of experience and good practice on identification, assessment and recognition of informal and non-formal learning, with a particular attention to development of integrated European solutions, for example in the context of sectors; development of high-quality, cost-efficient validation methodologies to be used at European, national and sector level; development of solutions based on existing experience that can be widely shared and disseminated; development and improvement of standards for validation of non-formal and informal learning, with priority to improving the quality and credibility of qualifications and competence standards; improvement of guidance and counselling on validation of non-formal and informal learning.

The same Life Long Learning programme also foresees finance for projects focused on improving validation of non-formal and informal learning within the sub-programme **Grundtvig**, dedicated to projects aimed at developing adult education and other educational pathways. Particular attention should be given to evaluating how existing frameworks and principles can be applied to adult learning in response to the specific needs of adults. Actions of this kind will develop the specific priority “Integration of the common framework on key competences for lifelong learning in learning pathways for adult learners”

Last but not least, validation of non-formal and informal skills has been tackled through the **EQUAL** Community initiative. EQUAL work has shown that 90 percent of people underestimate their own competences upon initial assessment. Validation is therefore extremely important as an empowerment tool. Successful validation focuses on the actual skills people have, engaging them in the validation process and linking outcomes to formal education.

Within the EQUAL framework experiences have been developing also with regards to **validation tools in practice**. Self-assessment of skills can be made for example online. Distance validation is cost-effective in reaching a number of smaller companies as it overcomes time and resource constraints. Furthermore, Development Partnerships have shown that self-assessment can lead to a portfolio of evidence with certificates of formal and non-formal learning and this can be matched to job opportunities in the geographic area. There is also evidence that a digital type of portfolio has been very sought after by employers.

Time and effort put into raising awareness and getting the commitment of all stakeholders is well worth the investment. Support from line managers and senior management is important for an integrated approach. When all stakeholders design a validation system together, it reflects the needs and aspirations of them all: employees, employers, employee and employer organisations, social partners and representatives of education institutions.

Policy recommendations that EQUAL has addressed on the base of the results of the projects enacted under this field represent a useful policy tool as well, in order to foster the commitment of the Governments and the stakeholder in the development of validation schemes and paths. The particular focus on disadvantaged groups, strong partnership approach and learning from transnational partners offered a view of the validation as a powerful tool to harness existing skills and competences of individuals, contributing to their personal development, improvement of human capital in firms, and making people more

employable in the labour market. Recommendations include that the Commission and Member States should apply the experiences of EQUAL to the new Leonardo da Vinci projects to ensure complementarity. Member States in particular should use experiences, develop solutions and incorporate them in national legal frameworks for validation and thus support people in achieving their full potential at work. Governments should also apply informal validation practices as employers. Employer organisations, trade unions, formal education institutions and individual employers need to collaborate and build strong partnerships so that validation reflects the needs of all stakeholders. Employers should recognise the importance of valuable skills gained by their workers on the job by interacting with other stakeholders and applying what they learn about validation of non-formal and informal learning. Education providers need to 'open up', recognise the value of experience gained outside the formal learning environment and work closely with organisations responsible for validation. Social Partners should take advantage of the achievement of EQUAL to address the institutional framework of the Member States to facilitate implementation of validation systems.

7.3 Target groups

The different policy tools illustrated above are referred to different subjects. Some of them are directly addressed to Member states and stakeholders, which is to say to all those subjects who can contribute to the implementation of the investment on human capital and in particular to the long life learning objectives. Governments and stakeholders are called at implementing the validation of informal and non-formal skills by legislative intervention, policies and more practical tools, in a perspective of mutual organisation and harmonisation, in the light of the open method of coordination adopted at European level.

Applicants for the Life Long Learning Programmes are listed in the decision of the parliament and the Council of 2006⁴⁷.

For the Community initiative EQUAL, as framed within the European Social Fund, it was specifically addressed to those subjects who can apply for these kind of funding, namely regions and other subjects acting in direct connection to the territory within the European Union. In particular, the beneficiaries of the funds have been individuated in Development Partnerships, groups of subjects of different nature, formed on a transnational base.

7.4 Feedback

Most Member States either have, or are currently developing, methodologies for the validation of existing skills. Changes are already taking place to make education and training systems more open and flexible for individuals (e.g. more work-related training, 'bite size' learning, combined academic and vocational qualifications). High quality validation both facilitates mobility for the individual and makes it easier to improve policies on a national and/or transnational level.

In order to establish a Community framework for the transparency of qualifications and competences, the Commission is promoting a personal coordinated portfolio of documents –

47. <http://eur-lex.europa.eu/lex/LexUriServ/LexUriServ.do?uri=OJ:L:2006:327:0045:0068:EN:PDF>

the "Europass" – which citizens, if they so choose, will be able to present throughout Europe as a means of communicating their competences and qualifications.

Assessed results are available for the actions supported by EQUAL. With particular regards to the practical benefits that can arise, EQUAL shows how investment of efforts and resources in validation of non-formal and informal learning pays off for everyone concerned.

The focus on existing skills and their validation empowers *individuals*. With self-assessment and awareness of what they already know, EQUAL has successfully demonstrated that disadvantaged people can get advice and draw up a personalised training and development plan and top up their qualifications. After gaining qualifications through validation many individuals involved in such schemes expressed a wish to go on to gain higher qualifications.

In several EU countries, validation has also been successfully targeted to empower particular groups of disadvantaged people by addressing the needs and circumstances of the unemployed and older workers, migrants, long-term unemployed, refugees, prisoners.

Employers become aware of what competences their employees and potential employees possess, or not, and can make adequate investment in their human capital and have a better return of their investment. Savings on training are considerable because individuals only learn what they need for their job and take off less time from work and private life for training.

Education institutions find themselves more in demand as people empowered by validation (possibly including certificates and diplomas) seek more learning.

In several Member States, *social partners*, employer representatives and trade unions, have learned how to use validation as a tool to communicate the needs of employers and employees to education institutions and make the training provision more demand-driven.

In some European countries, EQUAL proved that validation of skills makes it easier for people to enter and/or remain in the labour market and their skills can be used and developed to a higher degree than was possible before. This all benefits the economy as well as the individual and employers.

EQUAL has also successfully tested validation tools: a competence passport, which can be used to record the individual's ideas of what skills they would like to develop and a logbook that serves to register daily activities to develop personal portfolios. Competency workshops have been conceived, where job seekers or care professionals discuss their roles in a way that makes them realise what skills they have really got and aware of the skills needed, which helped them to plan better what steps to take towards the labour market.

Through the partnership, sectoral and transnational approaches have been tested that have given positive results. Support from line managers and senior management is important for an integrated approach. When all stakeholders design a validation system together, it reflects the needs and aspirations of them all: employees, employers, employee and employer organisations, social partners and representatives of education institutions. The experience in several Member States has shown that there can be substantial challenges in bringing together *stakeholders* with very different institutional cultures and interests to create instruments and methodologies for validation.

Under EQUAL, both industry standards and formal education systems have been used as reference points in validating people's skills. It has been demonstrated that the first approach of recognising skills in fact gives access to accreditation in a certain industry. The complementary approach, linking validation to formal education, proved that individuals that got a portable validation could use it to enter further training within the formal education system.

Employers need validation that reflects specific skills in specific jobs. Therefore EQUAL in some member states has piloted a sectoral approach to validation provides just that. It also ensures that the validation process is flexible and can quickly be adapted to changing requirements. In several EU countries, systems of validation for a very broad range of vocations have been developed and tested.

Transnational work with partners from several European countries has added real value to the validation work under EQUAL. It has enabled partnerships to develop validation solutions [informed by experience and expertise developed all over Europe and in different contexts. An added value of transnational learning is that the elements that contribute to a validation system's success become much clearer. This could be clearly shown for a validation system based on a combination of work based on learning, transferring work culture and tacit skills, and normal vocational training that resulted in 80% of the participants getting a job.

8. Fight against age discrimination

For many years the focus of EU action in the field of non-discrimination has been on preventing discrimination on the grounds of nationality and sex (the European Commission refers to sex discrimination as 'gender' discrimination). In 1997, however, the Member States approved unanimously the Treaty of Amsterdam. Article 13 of this new Treaty granted the Community new powers to combat discrimination on the grounds also of racial or ethnic origin, religion or belief, disability, *age* or sexual orientation. Since the Treaty of Amsterdam came into force in 1999, *new* EC laws, or Directives, that have been enacted in the area of anti-discrimination are the Racial Equality Directive, 2000/43/EC, and the **Employment Equality Directive, 2000/78/EC**.

Directive 2000/78/EC prohibits unjustified forms of **age** discrimination in employment preventing disadvantaged age groups from participating fully in the labour market. The directive prohibits *direct* and *indirect* discrimination (Article 2, fixing the concept of discrimination), harassment and instructions to discriminate on grounds of age, disability, sexual orientation and religion or belief in relation to access to employment, self-employment and occupation, access to vocational training and guidance, employment and working conditions, including dismissals and pay, membership of and involvement in any organisation of workers or employers or a professional organisation.

Non-discrimination legislation is necessary to remove structural barriers to the employment particularly of older people, and to ensure that they are not discriminated against in employment, for example in the provision of training. But not all differences of treatment will be unlawful, as they may be justified under national labour market policy and the attempt to increase the employment opportunities of older workers.

8.1 General description

The directive requires all 15 EU – as of 2004, all 25 – countries to introduce legislation proscribing direct and indirect discrimination in terms of labour market activities and vocational training on the grounds of age.

No age limits are specified in the directive, and Article 6 and paragraphs 1 and 14 of the preamble can be interpreted as exempting mandatory (age-based) retirement. In addition, there are a number of exemptions relating to cases where age is considered to be a genuine and determining occupational requirement, and where the use of age as a deciding factor is justified by a legitimate aim, for example, positive discrimination to help age-related disadvantaged groups.

With more specific reference to the text of the Directive, the guidelines are already drawn in the preamble. Discrimination based on religion or belief, disability, *age* or sexual orientation may undermine the achievement of the objectives of the EC Treaty, in particular the attainment of a high level of employment and social protection, raising the standard of living and the quality of life, economic and social cohesion and solidarity, and the free movement of persons. To this end, any direct or indirect discrimination should be prohibited throughout the Community.

Some burdens are already fixed in the preamble as well: the Directive shall be without prejudice to national provisions laying down retirement ages. Moreover, Member States may choose not to apply the provisions of this Directive concerning disability and age to all or part of their armed forces, to safeguard the combat effectiveness of their armed forces. Nevertheless, Member States, which make that choice, must define the scope of that derogation. In very limited circumstances, a difference of treatment may be justified where a characteristic related to religion or belief, disability, *age* or sexual orientation constitutes *a genuine and determining occupational requirement*, when the *objective* is *legitimate* and the *requirement* is *proportionate*. Such circumstances should be included in the information that the Member States have to periodically provide to the Commission.

The prohibition of age discrimination is an essential part of meeting the aims set out in the Employment Guidelines and encouraging diversity in the workforce. However, differences in treatment in connection with age may be justified under certain circumstances and therefore require specific provisions. It is therefore essential to distinguish between differences in treatment, which are justified, and discrimination, which must be prohibited.

Article 6 fixes the criteria under which differences of treatment on grounds of age might be justified. Member States may provide that differences of treatment on grounds of age shall not constitute discrimination, if, within the context of national law, they are objectively and reasonably justified by a legitimate aim, including legitimate employment policy, labour market and vocational training objectives, and if the means of achieving that aim are appropriate and necessary. Such differences of treatment may include, among others:

- the setting of special conditions on access to employment and vocational training, employment and occupation, including dismissal and remuneration conditions, for young people, older workers and persons with caring responsibilities in order to promote their vocational integration or ensure their protection;

- the fixing of minimum conditions of age, professional experience or seniority in service for access to employment or to certain advantages linked to employment;
- the fixing of a maximum age for recruitment which is based on the training requirements of the post in question or the need for a reasonable period of employment before retirement.

Member States may provide that the fixing for occupational social security schemes of ages for admission or entitlement to retirement or invalidity benefits, including the fixing under those schemes of different ages for employees or groups or categories of employees, and the use, in the context of such schemes, of age criteria in actuarial calculations, does not constitute discrimination on the grounds of age, provided this does not result in discrimination on the grounds of sex.

The directives explicitly recognise that outlawing discrimination will not necessarily be enough by itself to ensure genuine equality of opportunity for everyone in society. Specific measures might be called to compensate for disadvantages arising from a person's age (or other characteristics) which might lead to them being treated unfairly. For example, certain age groups may need special training and specific help to have a reasonable chance of finding a job. Putting on training courses or making different arrangements especially for them are ways of improving their chances. The directive allows positive actions of this kind to be undertaken and does not regard them as infringing the principle of equal treatment.

Member States shall take care that the provisions adopted pursuant to this Directive, together with the relevant provisions already in force in this field, are brought to the attention of the persons concerned by all appropriate means, for example at the workplace, throughout their territory.

The Directive, though specifically addressed to the legislative bodies within the Member States, also encourages forms of exchange of views and tools in order to make the anti-discrimination provisions more effective. In particular it recommends that Member States, in accordance with their national traditions and practice, take adequate measures to promote social dialogue, with a view to fostering equal treatment, including through the monitoring of workplace practices, collective agreements, codes of conduct and through research or exchange of experiences and good practices. Where consistent with their national traditions and practice, Member States shall encourage the social partners, without prejudice to their autonomy, to conclude at the appropriate level agreements laying down anti-discrimination rules in the fields which fall within the scope of collective bargaining.

In the same cooperative perspective, the Directive encourages the dialogue with appropriate non-governmental organisations, which have, in accordance with their national law and practice, a legitimate interest in contributing to the fight against discrimination, with a view to promoting the principle of equal treatment.

8.2 Target group

Directives are binding, as to the result to be achieved, upon each **Member State** to whom they are addressed. However, the national authorities are left the choice of form and methods to achieve their objectives.

The Member States had until 2 December 2003 to transpose the requirements of the directive into national law. However, in order to take account of particular conditions, Member States could, if necessary, have an additional period of up to 3 years to implement the provisions of the directive on age discrimination. The United Kingdom, Germany, Sweden, Belgium and the Netherlands made use of this extra time and for this reason have not been obliged to bring into force the prohibition on age discrimination until December 2006.

If the Commission believes that a Member State has breached Community law it is entitled to initiate an 'infringement procedure' under article 226 EC Treaty. In particular, a procedure of "non-conformity" can be initiated, where a Member State is notified by the European Commission that its national measures do not conform with the Directive in question. The Member State is given a reasonable time by the European Commission to put its legislation in conformity.

If the procedure is not settled during the preliminary stages of the infringement procedure process, and the European Commission is of the reasoned opinion that a Member State is still in breach of Community law, the European Court of Justice (ECJ) is called on to pronounce on the matter. If the ECJ upholds the case, it may impose a financial penalty on the Member State in question under article 228 EC, if the Member State does not comply with the judgment.

For objectives laid down in directives to become applicable to **individual citizens**, an "act of transposition" by national legislators is required, whereby national law is adapted to the objectives laid down in directives. Individuals are given rights and bound by the legal act only by virtue of the transposition national law.

8.3 Feedback

As noted earlier, transposition of the European equal treatment Directive among Member States has been piecemeal. In some cases, actions have been perfunctory, provisions weak and the social partner response lukewarm. Against this background it is questionable whether equality legislation will play a major role in tackling age discrimination in European labour markets.

A 2004 review⁴⁸ concluded that transposition of the directive has been uneven: little or no progress has been made in Germany; France and Italy have complied technically, although more could be done. Moreover, while the directive calls for consultation with a range of stakeholders, this was lacking in France and Italy.

In 2001, French reform included age in provisions in the Labour Code regarding discrimination, adjusted the burden of proof in discrimination cases and made it easier to pursue a case. However, neither employers nor trade unions appear to have strongly supported this reform, and age discrimination does not feature strongly in collective agreements. Furthermore, the Labour Code had stipulated that an employer terminating the contract of a worker aged 50 years and over must pay a special premium known as the 'Delalande contribution'. This appeared to have had little effect on redundancy among older workers, and may in fact have discouraged their recruitment as any subsequent layoff could prove costly to

48. Baker, 2004

the company. The French National Action Plan of 2003 announced that the contribution would be relaxed for companies laying off employees who were recruited at 46 years of age or over. Current evidence is that this attempt to tackle age discrimination has had little impact.

In Greece, the Law 3304/2005 under Regulation 43/78/2000 aims to secure equal treatment in the labour market, and age is one basis for non-discrimination. However, the age related exemptions are extensive and implementation of the law has yet to begin.

The German federal government has been slow to bring forward proposals on legislation against age discrimination. This is partly due to the fact that the term ‘age discrimination’ has not found much resonance among politicians or scientists working in the field of old age policy. Nevertheless, in the light of the European equal treatment Directive prohibiting discrimination in the labour market on the grounds of age, the federal government came up with a draft version of a law against discrimination in autumn 2004. Due to relections in 2005, the law against discrimination was not foreseen to come into force until August 2006. In 2006 the ECJ ruled against Germany for lack of transposition of Directive 2000/78/EC⁴⁹. In accordance with the European Directive, nowadays the German ‘Equal Treatment Act’ prohibits, *inter alia*, discrimination on the grounds of age. A 3-year extension for age discrimination provisions has been requested. Nevertheless, there are already several legal provisions against age discrimination in the German labour market. According to Article 36 of the Social Security Code (Sozialgesetzbuch, SGB III), federal employment agencies may only accept age limits in job advertisements from employers if these age limits are justified by the type of job that is offered. The Law on Labour Relations at the Workplace (Betriebsverfassungsgesetz, BVG) stipulates that both employers and works councils may not discriminate against workers on grounds of age and that works councils have the right to initiate measures to promote the employment of older workers (Articles 75, 80 and 96, BVG). However, in practice, these provisions do not prevent negotiations on early retirement. Issues of training, protection against redundancy and options for part-time work for older workers also feature in some collective agreements

Italy addresses discrimination in employment on the grounds of age in its constitution, which states a general principle of equality and non-discrimination. A Workers’ Statute prohibits discrimination on various grounds, although age is not mentioned explicitly. There are currently no plans to strengthen existing provision, though the recent Biagi law has added age discrimination to the list of prohibited acts for job agencies in their placement activities. In addition, an independent governmental Department of Equal Opportunities helps individuals, informs policy and disseminates information to raise public awareness. Age discrimination has not been high on the agenda in discussions between the social partners.

In Spain, primary legislation introduced in 2003, on fiscal, administrative and social measures, addresses discrimination in employment on various grounds including age, and in terms of both direct and indirect discrimination. However, the trade unions would also like to see the principle of equality built into collective agreements; some progress appears to have been made in this regard. For its part, the Spanish Confederation of Employers’ Organisations (CEOE) considers that equal treatment with regard to age has already been progressed, with steps to eliminate incentives for early retirement and the ending of seniority pay supplements. CEOE also argues that legislation is not the best way to tackle discrimination, believing that it

49. Case C-43/05 (Germany)

is burdensome for business. It would prefer more support to business in terms of increasing access to employment for disadvantaged groups and workplace adaptation. Most issues contained in the equal treatment Directive were dealt with in 2002 by government bill 2002/03:65, An extended protection against discrimination. The issue of 'other grounds for discrimination' (such as age) was delegated to the Discrimination Committee, which was established in 2000. However, in terms of the remit of the committee, the word 'age' has not been mentioned. To date, there has been no public debate concerning the age dimension in the directive. It should also be added that a number of *ombudspersons* are active on discrimination issues. These are institutionally defined public bodies, and act as official representatives on public bodies on issues within their jurisdiction. However, there is no ombudsperson for older people or ageism as a form of discrimination.

In 2002 the Swedish Government established a special Inquiry Commission to deliberate on how to extend Sweden's existing anti-discrimination legislation to age discrimination. An extra 3 years have been requested for the implementation of age discrimination provisions specifically foreseen by the Directive. Although the issue of older workers is a concern of the Swedish Employers' Federation (SAF), they are opposed to new regulations and binding rules that could inhibit the initiative of companies. SAF accepts the principle of promoting workforce diversity but is indifferent or hostile to policies aimed at furthering employment prospects for specific groups.

In the Netherlands, the Equal Treatment in Employment (Age Discrimination) Act prohibits age discrimination in terms of recruitment, selection and appointment of staff, promotion and dismissal. Furthermore, it applies to vocational education, vocational guidance, and membership of employer and employee associations or organisations of occupational groups. Age limits are allowable in some circumstances, if they can be justified – for example, concerning mandatory retirement before the age of 65 years. The legislation came into force in 2004. An Equal Treatment Commission oversees the implementation of legislation and can investigate complaints. The prohibition of age discrimination also applies to the liberal professions and trade unions and employers' organisations, but it did not apply to the armed forces until 2008. It has still been possible, December 2006, to link a compulsory dismissal to the starting date of a pension without any justification of the dismissal being required. The Equal Treatment Commission can investigate whether discrimination on grounds of age has taken place. The social partners have been informed of the new legislation. With the adoption of this law the Netherlands considers that it has fully transposed Directive 2000/78/EC.

In the UK, since the publication of the European equal treatment Directive, there has been substantial debate around the form and content of the legislation. Linked to this, some controversy arose over the issue of mandatory retirement. After a considerable delay, the government recently released draft regulations. The UK undertook a public consultation "Equality and Diversity: Age Matters" in 2003. The "Age Positive" campaign aims to raise awareness of employers on age diversity, and 750,000 copies of a voluntary code of practice for employers on age diversity at work have been issued, and Age Positive awards were made in 2004. A group made up of representatives of employers, trade unions and age organisations has been established by the Departments of Trade and Industry and Work and Pensions to work on the new legislation. Further consultations took place in summer 2005 on the draft secondary legislation which was introduced in October 2006, will cover both direct and indirect age discrimination in employment and vocational training. In exceptional circumstances, treating people differently on the basis of age is allowable, but employers must be able to justify doing so and will be required to produce supporting evidence. The issue of a

default retirement age proved controversial: the Department of Trade and Industry and business groups are said to have favoured a default retirement age of 65 years, while the Department for Work and Pensions and the trade unions preferred having no mandatory retirement age. In the end, the government decided on a default age of 65 years, though this will be subject to review. While the legislation has yet to be implemented, it is notable that, in contrast to the situation in France, as will be shown later, it already appears to be encouraging action among some of the case organisations.

In autumn 2004 the Danish Government put forward a draft law amending the Act on Discrimination in the Labour Market to insert age and disability in the existing list of prohibited grounds of discrimination. This law came into force on 12 January 2005. It obliges employers to make reasonable accommodation for disabled people in employment and training. Positive action aimed at improving the employment opportunities of people who are disabled or of a particular age is permitted. Certain differences of treatment based on age are allowed. Age and disability are added to the list of characteristics, which may not be specified in job advertisements.

Belgium transposed Directive 2000/78/EC into federal law by the Act of 25 February 2003 combating discrimination¹, which also amended the legislation establishing the Equal Opportunities and Anti-Racism Centre (which can deal with age discrimination). Although the Act of 25 February 2003 includes age among the prohibited grounds of discrimination, it contains no equivalent of Article 6 of the Directive, which allows the Member States to provide that certain differences of treatment on grounds of age may be justified in certain circumstances. As direct discrimination is not in general justifiable, the implication is that all differences of treatment on grounds of age would be discriminatory, without a specific transposition of Article 6. Apart from Article 6, Belgium considers that it has transposed Directive 2000/78/EC. Belgium plans a four stage study to enable it to enact national provisions transposing Article 6 of the Directive: the Federal Government Service for Employment, Labour and Social Consultation will take stock of all existing regulations regarding age discrimination; it will study whether these regulations comply with the Directive; it will repeat these two aspects in relation to the other Federal Government Services; it will study whether it is sufficient to reproduce the wording of Article 6 of the Directive or whether the grounds of justification need to be explained in more detail (including looking at how other Member States have transposed Article 6). Phase 1 has been completed, and phase 2 is on-going.

More in concrete, the case law of the ECJ offers interested and specific feedback on the real application of the anti-discrimination directive. In fact, the case law of the highest national courts and of international courts (like the European Court of Justice - ECJ) are an important source to know what "the law" is. This means that the concrete impact of a certain legal measure, taken by the legislator, becomes truly visible as soon as courts start using this legal measure as a basis for their judgments of concrete legal disputes that are brought to their attention. In general, the ECJ has played an important role in the interpretation of EC law, especially by the judgments in the rulings on the basis of Article 228 (Infringement procedures) and, more concretely, on the basis of Article 234 EC (preliminary rulings). Concerning the Employment Equality Directive (2000/78/EC), the ECJ until now has not given many judgments about the meaning of certain provisions or the question whether the Directives have been implemented in a correct way. This is because the implementation dates have expired only recently. But it will represent an important instrument in the future, to

check the effectiveness of the provisions stated in the Directive in the different Member States.

At the moment, some examples of European case law provide us with some clues on the most debated rules descending from the Directive. Once the legal national act transposing the directive into national law has come into force, also individuals can benefit of the rights descending from it. Single citizens will then be entitled to appeal the national courts for the protection of their rights.

Nevertheless, it might happen that the national courts, before making the decision, find that the national legislation appealed by the individual might in fact not comply with the provisions set in the Directive.

The ECJ can therefore be asked by the national courts of a preliminary rulings, as for the procedure of article 224 EC.

Some judgments given by the ECJ in these preliminary procedures may offer an insight of how the Directive needs to be applied in order to grant the full respect of the anti-discrimination principles.

With particular regards to age discrimination, and more in particular, to the discrimination against older workers, the ECJ has been called in few occasions to provide an interpretation of the Directive and on the conformity with its principles of certain national laws and collective agreements regarding treatments applicable only to older workers. One in particular offers a practical example of what has to be intended as an “objectively and reasonably justified” exemption to the principle of non-discrimination based on age.

In a 2007 ruling (Case C-411/05), the ECJ had been appealed with regards to the Spanish rules, transposing the directive, which includes a transitional provision whereby compulsory retirement clauses not justified by employment policy objectives but contained in collective agreements are deemed valid. In that case, the ECJ ruled that the Directive must be interpreted in the sense that it does not preclude national legislation pursuant to which compulsory retirement clauses contained in collective agreements are lawful. But such clauses must provide as sole requirements that workers must have reached retirement age, set at 65 by national law, and must have fulfilled the conditions set out in the social security legislation for entitlement to a retirement pension under their contribution regime. The measure, although based on age, must be objectively and reasonably justified in the context of national law by a legitimate aim relating to employment policy and the labour market, and the means put in place to achieve that aim of public interest must not appear to be inappropriate and unnecessary for the purpose.

Conclusions

The exposition of the good policy practices at national level and the identification of relevant frameworks and actors at European level carried out above means to offer an overview of the approaches and the consequent actions undertaken in the field of intergenerational relations at work. The overall aim of this report has been to provide information with regards to the initiatives adopted within the labour market in order to foster greater social cohesion through the improvement of integration among the different generation.

This last feature seems to be an urgent goal to pursuit, linked to the necessity to face the progressive ageing of population. Over the last 50 years, in fact, the increasing of life expectancy of European citizens, certainly representing a good outcome of much economic and social progress, at the same time has posed main questions for individuals, families, social systems. The ageing population and the low birth rate, have to be combined with a series of economical, employment and development exigencies deriving from global changes, which even more impose the European Union and the Member States to re-shape family, occupational, social security, social cohesion policies, all in the light of what has been named “the demographic challenge”.

The different perspectives involved in these frameworks, the economic, the occupational and the demographic ones, have been object of several policy interventions both at European and national level, which tackle, from time to time, one issue more than another, but always showing a certain link among the different elements. If we look at the European level policy making as a whole, we notice that the demographic, the economic and the occupational issues have been approached in an integrated way. This means that the different policy initiatives are strictly connected and inter-dependent. Therefore the choice of adopting the *intergenerational relations* as *fil rouge* in the selection and description of the policy practices made above, has not only been due to the focus of our report. This is actually (one of) the perspective(s) adopted also by the European policy makers. Policy initiatives have been undertaken in different contexts, but the main point of reference has always been the creation of a new, greater *solidarity between generations*, in order to transform the demographic *challenge* into an *opportunity*.

Nevertheless, it is not possible to ignore a certain degree of **fragmentation** of the labour market and of the whole society. This circumstance, more evident at national level, often brings at addressing diversified policies more specifically targeted to age and generational groups, following the different approaches and difficulties that workers of different age and gender might adopt and encounter with regards to their access and permanence in the labour market.

Keeping into account the above mentioned fragmentation, in this conclusive section, we will try to give an overview of the policy initiatives in a more generation-targeted perspective. The effort will also be in the sense of linking the European level policy making with the outcomes of the research at national level.

The overall framework is fixed within the Lisbon Strategy, defined in its “policy declinations”, the European Employment Strategy and the Guidelines for Employment. The general objective consists in making of Europe the most competitive, dynamic knowledge-

based economy; this also involves the modernisation of the European social model, by **investing in human capital** and combating social exclusion. These goals have to be achieved, following the European policy framework, by pursuing full employment, or, at least, **more and better jobs**. In line with this aim, **raising the employment rate of older people and women** is the first and main step to make. Nevertheless it is not possible to ignore the situation of **younger workers**, who seem to face great difficulties in entering working life, especially if they are low skilled or educated, in facing a growing level of precariousness, and in conciliating work with private life (especially if they are women and have children).

With specific regards to **older workers**, their retention on the labour market and their re-entrance in case of previous exclusion represent the main features. Specific **active ageing policies** are promoted at European level. The strategies to be adopted are in the sense of a dynamic, *life cycle approach*, which tends to *maximise each person's capacity*, also through *preventing the erosion of skills* throughout adult working life and providing always higher and *adaptable skills*; improving *quality in work* to provide a safe, attractive and *adaptable work environment* in order to persuade older people to participate in the labour market over his or her whole life cycle. The challenge is to enhance the employability of those currently aged in their 40s and 50s. In this sense, Member States in particular are called to update and revise their occupational plans: parties concerned, beside the national, are also regional and local organisations. Not only, also the social partners at European as at national level, are called at supporting the active ageing policies with targeted actions which could be enacted within concertation, collective bargaining, companies.

Older workers still represent one of the largest target groups for raising employment. There has been recent progress in encouraging active ageing strategies especially through restricting eligibility conditions, while compensating for particularly demanding or hazardous jobs, by increasing incentives to work longer for employees (BG, AT, FR, ES, DK, PT), by enhancing work opportunities for older and particularly disabled workers and by improving working conditions and providing opportunities for skills upgrading and retraining.

Furthermore, the revised European Employment Strategy considers as a priority the need to **delay retirement**. In 2003, the European Commission argued that a radical policy shift away from early retirement is necessary and that part of the challenge consists in ensuring that a higher proportion of those currently aged 55–64 years stay in work. Member States that need to make particular efforts, having made slow progress so far, are Austria, Belgium, France, Germany, Greece and Italy⁵⁰.

Another fundamental practice, which is valid also for other age groups, is represented by **lifelong learning strategies**, in line with the intention to invest in human capital, through long life education and training, in order to increase **adaptability**. Trends show a correlation between employment and participation to lifelong learning, especially with regards to older workers. At the national level, both public⁵¹ and private initiatives aim at increasing the level of learning of the older workers. In particular, within the practices initiated at company and private level, personalised and specific training and courses, based on skill analysis,

50. More specific figures are provided at page 111, with regards to the feedback information on the implementation of the EES

51. Fund for professional experience (BE)

assessment of the competences⁵², consequent adaptation and positive exploitation of the elder's experience have been registered.

However, the level of adult participation has remained stable or has even decreased in most of the Member States since 2004. Participation levels are particularly low in Southern European countries and in most of the new Member States. The lowest participation rates throughout the EU continue to be those of older workers.

The European level offers good examples of lifelong learning measures aimed at adapting the ageing workforce to the labour market exigencies – and the other way round –, among the others, within the Community initiative EQUAL. In line with the empirical experience, the European level has also specifically addressed the policy of the **recognition and validation of non-formal and informal skills**, as a way to motivate older workers and understand the real value, which they might have gained during their working life. National qualifications frameworks in line with the European Qualifications Framework are being implemented or developed by the majority of countries with a view to facilitating international mobility as well as the transition between different education and training sectors. They are an important means for ensuring flexible learning pathways which are also facilitated by many countries setting up *systems for the validation of non-formal and informal learning* (AT, BG, CY, CZ, EE, ES, IT, LT, LV, LU, PL, RO, SE, SK, UK) while such systems already exist in others (BE, DK, FI, FR, IE, NL, PT, SI). The challenge here is to move from experiment to full application of such systems in national qualifications systems, including in access to higher education.

In the view of a greater equality of opportunities and conditions, EQUAL tackles the **prejudices** connected to the aged workforce. At national level, initiatives aims at the implementation of a new organisational culture, at assessing, emphasizing and ameliorating the professional competencies and abilities of the older workers, in order to facilitate their personal recognition and to benefit of their experience and know-how. Public policies tend to increase the **awareness** on the demographic related issues, which might affect the integration of the aged workforce. Studies, research, setting up of networks for the exchange of good practices in age management have been promoted. In this sense also private bodies and companies have taken part in processes aimed at gaining consciousness of the issues as well as of the possibilities connected to the aged workforce⁵³.

The practical approach of the Community initiative EQUAL also aims at promoting **new organisational approaches**: valorisation of the experience gained throughout the working life, in-depth assessment to capture tacit knowledge, development of learning platforms and discussion forums to spread good practices, coaching and training, tutoring and mentoring schemes, are the policy measures that have been supported under this funding initiatives and that have produced positive outcomes, capable to be transferred and replicated. At the national level, the research of new organisational approaches appears clear looking at the contents of the policy practices, which have been developed within private and specifically company

52. Knowledge pool 50+ (BE), Vuurtoren45+ (BE), Mec - Lab – new horizons for workers over 45 years old in the mechanical industry of Bologna (IT), Somague Engineering (PT)

53. Accor: Intergenerational diversity: we can really do better together (BE), Ageing population and intergenerational relations (Be)

initiatives⁵⁴. The approach seems to be more practical. Not only older workers are targeted: target groups are constituted also by human resources management representatives, who need to develop a new culture and apply innovative decisions with regards to the older generation.

Last but not least, a **European legislative framework** in order to fight discrimination based on age has been designed, and Member States are obliged to transpose the European directive into their national legislation. Even if the wide definition of discrimination based on age should regard all generations, both the European directive, and the national legislation and jurisprudence show that the group, which is most at risk in this sense, is represented by the elder.

The European policy makers also have to tackle the serious issue of the integration of **young people** in the labour market. Social exclusion of young people carries high social and economic costs and needs to be prevented. While overall conditions for young people in Europe today are positive – freedom and security, prosperity, longer life expectancy –, there is increasing concern about high rates of child poverty, poor health, school drop-out and unemployment among a too large number of young people. There are more opportunities to learn and participate but less established pathways. Moreover, young people will have to bear the growing cost of an ageing population, which calls for an intergenerational response. The challenges young people are facing today are complex and diverse. Within the framework of the Lisbon and the EE strategies, the European Commission, on request of the European youth organisations, have stipulated the **Youth Pact**. It sets a series of policies and aims at **improving education, training, mobility, vocational integration** and social inclusion of young Europeans, while facilitating the **reconciliation of working life and family life**. In particular it recommends Member states to specifically set and monitor policies for the sustained integration of young people into the labour market, in the context of the **mutual learning programme** on employment; to improve the situation of the most vulnerable young people, particularly those in poverty, and to initiatives to prevent educational failure; to encourage young people to develop **entrepreneurship** and promoting the emergence of young entrepreneurs⁵⁵.

Increased efforts to fight youth unemployment are reported by many countries. Policy measures are pursued along 4 axes: through improved vocational education and training pathways (AT, BE, LU, EE), specific guidance and pathways for at-risk school leavers (BE, FR, DE, LU, SI) and specific contract schemes with a training component (LU); through intensified and personalised guidance and job-search support (PT) and creation of employment pathways (MT); through reduction of employers' social security contributions (BE, ES, HU, SE), tax promotion for apprenticeship places (AT, FR), wage support for recruitment of long-term unemployed (DE); through strengthening the conditionality of social or unemployment benefits (CZ) and reduced taxation of students' jobs (FR)

However, as far as youth unemployment is concerned, all these measures combined have not given excellent results, so far: only about half of the Member States have seen an improvement in youth unemployment between 2000 and 2006. In 2006, young people still remained exposed to unemployment more than twice as much as the overall work force.

54. Start again after 45 (IT), AQUA_mark: Good policy practices for companies and employees in small- and middle-class businesses (DE), Somague Engineering (PT)

55. At page 111 national feedback on the policy development in these senses and the outcomes in the different Member States are provided

Despite these not positive outcomes, practices have been implemented at national level. Private and public initiatives tend to stimulate job creation and integration for young people through **entrepreneurship**⁵⁶. **Education and learning systems** have been created in the Member States in order to raise the knowledge level of the youth, in order to **prevent early school leaving** and in order to improve integration opportunities of those young who are disadvantaged for other reasons. However, there are still 17.5% of young men and 13.2 % of young women leaving school with at most a lower secondary education. Only six Member States have reached the target of no more than 10%.

Personalised **help and guidance** of young people, especially low qualified, given by older workers represent an intergenerational element which seems to foster youth integration: **mentoring systems** are promoted both at public level, in function of counselling on vocational attitudes, and at private level, in order to improve the know-how and the integration within the company⁵⁷.

National measures have been undertaken as well in order to facilitate the access to the labour market also of those young people who are highly qualified. In some cases they propose either de-taxed labour for young inexperienced people, or for even educated young without working experience, or not well regulated initial professional trainings for students, which should, in their intentions, facilitate the entrance of young people in the labour market providing them with first professional experiences. If these schemes can be reconducted to a **genuine training-on-the-job**, with appropriate accompanying measures, they do represent good practices. But, on the contrary, they are an unjustified extension of the integration paths for educated and qualified young, which should be pursued differently. In other cases represent a mixed of study and work which is not profitable for the young but only for the companies, who can dispose of an almost endless low paid workforce looking for an opportunity.

Another ground on which European youth needs to be supported by specific policies is the one regarding the **reconciliation of working and family life**. At European level policies have been proposed to reach the goal by **sharing the responsibility between partners**; particularly by **expanding the child care network** and **developing innovative forms of work organisation**. The European Commission has addressed a specific communication to the Member States and to all the stakeholders at national and European level in order to create measures facilitating young people in having a family and holding a job at the same time. Within EQUAL the problem has been studied and faced with respect to policies which can be developed in particular within small and medium enterprises, which normally claim that they cannot afford the costs to respond to the flexibility needs of the young parents with children. The experience has proved that efforts at organisational level are possible, feasible and financially sustainable. Companies have been supported in introducing full-time hours over four days, periodic home working and telework, combinations of long and short days and working longer hours over a defined period to accrue non-working blocks of time. Those banked hours could for instance be used during schools holidays or family emergencies. Results were very satisfying, especially for female employees. And not only: practices involving flexibility of the working hours, for example, could also be transferred to other age

56. Project AUDAX - support and promote the entrepreneur spirit mainly in family companies (PT), Wallonie entrepreneur (BE), "Mothers- daughters" mentoring in Tuscany for the start up of new female entrepreneurship (IT), "Hand" project – traditional and ancient professions for new employability in Basilicata Project "MANO" (IT)

57. The mentoring scheme of young people towards employment (FR),

groups (i.e. older workers who need to adapt their working commitment in the light of their personal exigencies). At national level, public interventions aim at collecting information about and evaluate policies to promote reconciliation of work and family existing on a company level across the country⁵⁸. Other practices, for example at company level, have not been reported. This also mirrors the situation as it has been monitored by the European Commission that, creating the European Alliance for Families, aims at increasing the number of good practices through a continuous exchange, as much still has to be done in this sense: in fact, the issue of reconciliation between work and private life is gaining some impetus in Member States, mostly through the commitment to improve the provision of childcare facilities (AT, DE, EL, LU, NL, PT, UK). However, many Member States are far from reaching the childcare targets and most do not even refer to them in their national strategies.

The ground of reconciliation of work and family life is the only one where specific measures seems to be foreseen also to support **female employment and permanence on the labour market**. The European data in this sense are discouraging, as a consequence of the scare attention that has been paid so far to the gender related issues within the labour market.

The most effective practices to foster both youth and elder integration in the labour market seems to be the ones which also present the **highest level of intergenerational integration**. Beside education through the all life, which is a common ground both for older and young worker, the assistance and the **transfer of knowledge** from the older is the most effective way which has been experienced in order to provide guidance and training to the young, positively exploiting the know-how of the elder. At the European level, EQUAL has proved the effectiveness of tutoring and mentoring schemes that support the flow of knowledge between generations. At national level, these kinds of practices have been initiated both by public institutions and by companies⁵⁹.

Another ground on which **intergenerational solidarity** seems to be necessary, in order to achieve social cohesion, regards the **social security systems**. In the last years the European Union policies have recommended Member States to revise the social protection schemes in order to make them sustainable and fairly balanced between the young generation, still at work, who will not be easily replaced, given the low birth rate, and the older one, which is growing more and more, and presents increasing necessities of care and assistance. Several Member States have already addressed specific measures, which foreseen the creation of private and complementary pension funds, in order not to exploit public finances too much, and not to raise the contribution rates. Other policies aim at discouraging early retirement. But the most effective measure definitely consists in raising the employment rate of the older workers and their permanence on the labour market.

58. Family Friendly Workplace award (HU)

59. A firm optimising knowledge transmission in the Lorraine region (FR), Transfer of knowledge into a non-profit organisation (DE),