



**Bericht zum Stand der Dinge**  
**als Teil des**  
**„AGEADAPT | Adaptation Tools for**  
**Ageing Workforce in SMEs“ Projekts**  
**(Anpassungswerkzeuge für die**  
**alternde Belegschaft in KMU)**

**Basierend auf der Analyse von Studien in den Partnerländern und**  
**ausführlichen Einzelinterviews**



**AGEADAPT Projektkonsortium 2022**



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## 1. Unser Projekt

Das Hauptziel des Projekts ist es, Lernmaterialien für zwei Hauptzielgruppen zu erstellen. Erstens die kleinen und mittleren Unternehmen (KMU), die sich auf die sich verändernde Altersstruktur vorbereiten müssen, um in naher Zukunft ihre Belegschaft halten zu können, und zweitens Menschen über 55 (erfahrene Arbeitnehmer) und deren Bedarf, ihr Wissen über die eigenständige Nutzung digitaler Tools im Arbeitsleben zu aktualisieren.

Das Projekt zielt darauf ab, ein System von Bildungsmaterialien über Altersmanagement für Unternehmen und Lernmaterialien für erfahrene Arbeitnehmer\*innen im Alter von 55+ zu schaffen. Das Projekt zielt auf die Entwicklung von 6 Projektergebnissen, einem Bericht zum Stand der Dinge in den Partnerländern, *Best Practices* im Altersmanagement von Unternehmen, einem Anpassungsleitfaden für Unternehmen, inspirierenden Lernmaterialien (OER) für ältere Arbeitnehmer in Form von Mikro-Lerneinheiten - kurzen Lehrfilmen und Textmaterialien - und schließlich einer digitalen Bildungsplattform, die alle Ergebnisse an einem Ort zusammenfasst. Das gesamte System der Bildungsmaterialien wird von mindestens 120 Nutzern aus den Zielgruppen während des Pilotversuchs getestet. Wir erwarten, dass auf diese Weise beide "Seiten der Medaille" dazu beitragen, einen besseren Arbeitsplatz für alle zu schaffen, einen Dialog zu beginnen und das gegenseitige Verständnis zu verbessern, Möglichkeiten zur Steigerung des persönlichen Werts und des Werts für ein Unternehmen zu schaffen. Das Projektkonsortium besteht aus 6 Partnerorganisationen aus 5 europäischen Ländern, d.h. Deutschland (als Bewerberland), der Tschechischen Republik, Polen, Slowenien und Spanien. Bei den Organisationen handelt es sich um Experten auf ihrem jeweiligen Gebiet, darunter KMU-Verbände, Organisationen der Erwachsenenbildung, Beratungsexperten und ähnliche. Das Projekt zielt darauf ab, durch die Zusammenarbeit innovative Bildungsmaterialien bereitzustellen, die auf unterschiedlichen Erfahrungen und Praktiken im Bereich des Altersmanagements basieren. Darüber hinaus sind auch mehrere assoziierte Partner in das Projekt eingebunden. Schließlich werden während des Projekts 3 transnationale Treffen sowie 5 Multiplikatorenveranstaltungen organisiert.

## 2. Kontext der Recherche

Die Bevölkerung Europas altert weiterhin erheblich, so der "Ageing Report 2018" der Generaldirektion Wirtschaft und Finanzen der Europäischen Kommission. Obwohl die Gesamtbevölkerung in der EU im Jahr 2070 auf 520 Millionen Menschen ansteigen soll (das sind 6,5 Millionen mehr als 2019), wird ein Rückgang der erwerbstätigen Bevölkerung zwischen 15 und 64 Jahren auf unglaubliche 292 Millionen prognostiziert.

Das Phänomen der Alterung der Erwerbsbevölkerung hat zwar verschiedene Ursachen, führt aber immer zum gleichen Ergebnis: Alle Teilnehmer des Arbeitsmarktes (Arbeitgeber, Arbeitnehmer und Institutionen des Unternehmensumfelds) müssen sich darauf einstellen. Jede einzelne Organisation wird sich diesen Herausforderungen stellen müssen, denn es gibt immer weniger Arbeitskräfte und die Gesellschaft altert. Das Hauptziel des Projekts besteht daher darin, nützliche Instrumente für das Altersmanagement und die Bekämpfung von Altersdiskriminierung in Form von didaktischen Materialien, einem Leitfaden und einer digitalen Bildungsplattform für zwei Hauptzielgruppen zu schaffen: Eigentümer und Manager von KMU und Arbeitnehmer über 50 Jahre.

Im Bewusstsein der Bedeutung und Aktualität des Themas Altersmanagement auf dem Arbeitsmarkt und damit der Bekämpfung der Altersdiskriminierung hat das Konsortium aus 5 Organisationen im Dezember 2021 die Umsetzung des Projekts mit dem Titel "ADAPTATION TOOLS FOR AGEING WORKFORCE IN SMES (AGEDAPT)" gestartet. Dieses Projekt wird im Rahmen der Erasmus + Initiative durchgeführt.

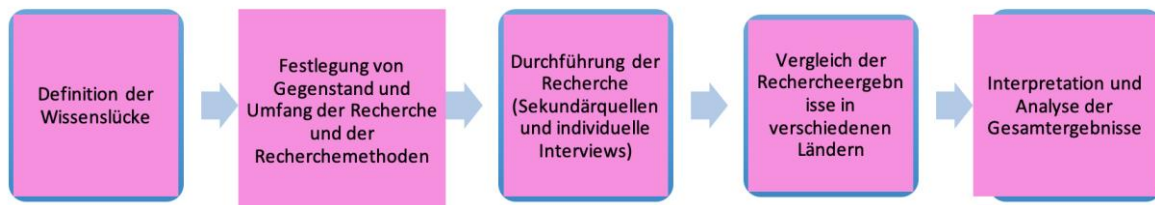
Das Projekt geht davon aus, dass die Grundlage für die Entwicklung jeglicher Managementlösungen (einschließlich derjenigen, die sich auf das Altersmanagement beziehen) die Ergebnisse einer eingehenden Forschung in einem bestimmten Bereich sind. Dieser Prozess umfasst die Analyse von Sekundärdaten (*Desk Research*) und die Durchführung einer Reihe von individuellen Interviews (IDI) zur Situation älterer Menschen auf dem Arbeitsmarkt und zu Lösungen in diesem Bereich, die in den einzelnen Partnerländern (Polen, Deutschland, Tschechische Republik, Spanien, Slowenien) durchgeführt werden.

### 3. Methodologie der Recherche

Um die höchste Qualität der Forschung zu gewährleisten und Messfehler zu reduzieren, ist es von grundlegender Bedeutung, Triangulation in den folgenden vier Dimensionen einzusetzen:

- Daten (Beschaffung von Daten aus verschiedenen Quellen)
- Forscher (Durchführung der Forschung durch mehrere Forscher)
- Theorie (die Nutzung verschiedener theoretischer Konzepte zur Erklärung von Phänomenen)
- Methodik (Kombination vieler Forschungsmethoden)

Es ist auch wichtig, die Möglichkeit zu gewährleisten, die Forschungsergebnisse mit anderen, ähnlichen Problemen zu vergleichen, sowie die Reflexivität der Forscher und das Bewusstsein für die verwendeten Methoden und Erwartungen.



*Diagramm 1. Das Recherchemodell, das im Rechercheprozess angewandt wurde*

Unsere Forschung wurde gleichzeitig in allen Partnerländern des Projekts im Zeitraum Dezember 2021 - April 2022 durchgeführt. Der Forschungsprozess setzt voraus:

- I. Analyse von Sekundärrecherche durch jeden Partner im jeweiligen Land. Grundlage der Analyse waren:
  - verfügbare Forschungsberichte,
  - wissenschaftliche Literatur,
  - Praxisbeschreibungen aus einzelnen Ländern,
  - Erfahrungen aus früheren Projekten,
  - Statistische Dokumente mit Bezug zum Altersmanagement in KMU in den Partnerländern
  
- II. Durchführung einer Reihe von 3 individuellen Tiefeninterviews mit Experten/Beratern, die sich mit Altersmanagement befassen/Vertretern von KMU, Führungskräften und Personalleitern in jedem Partnerland. Die Interviews waren halbstrukturiert und wurden auf der Grundlage eines zuvor erstellten IDI-Szenarios durchgeführt. Dieses Szenario bestand aus einer Reihe von offenen Fragen und vertiefenden Fragen, dank derer es möglich war, qualitative Daten über die Meinungen und Erfahrungen der Befragten zu sammeln. Die Auswahl der Befragten erfolgte bewusst und bestand darin, Personen mit umfassender Erfahrung im Bereich des Altersmanagements in

Organisationen zu Interviews einzuladen. Die durchschnittliche Dauer des Interviews betrug etwa 30-40 Minuten.

Auf der Grundlage der Analyse und Interpretation der Schlussfolgerungen aus dem Forschungsprozess wurde dieser "State-of-the-Art-Bericht" erstellt. Dieses Dokument wird die Grundlage für die Entwicklung einer Reihe von bewährten Praktiken im Bereich des Altersmanagements, eines Leitfadens mit einer Reihe von praktischen Tools für KMU-Eigentümer und -Manager sowie einer digitalen Bildungsplattform in diesem Bereich bilden.

## 4. Rechercheergebnisse in Polen

### 4.1. Hintergrund

In den letzten Jahren hat die Alterung der Gesellschaft in Polen zugenommen. Der Anteil älterer Menschen an der Bevölkerung Polens wächst systematisch. Ende 2019 überstieg die Zahl der Menschen im Alter von 60 Jahren und mehr 9,7 Millionen und stieg im Vergleich zum Vorjahr um 2,1%. Der prozentuale Anteil der älteren Menschen an der polnischen Bevölkerung erreichte 25,3%.

Die anhaltenden Veränderungen in der demografischen Struktur der Bevölkerung, die mit dem wachsenden Anteil älterer Menschen einhergehen, stellen eine Herausforderung für Wirtschaft und Gesellschaft dar. Der Alterungsprozess der Gesellschaft wirkt sich in erster Linie auf das Funktionieren des Gesundheitswesens, der Sozialfürsorge und der sozialen Sicherungssysteme aus und kann auch zu Problemen auf dem Arbeitsmarkt führen, die sich aus dem sinkenden Angebot an Humanressourcen ergeben.

Im Jahr 2019 hat sich die berufliche Tätigkeit der Senioren im Vergleich zum Vorjahr leicht verändert. Unter den älteren Menschen war die große Mehrheit wirtschaftlich inaktiv.

Der Hauptgrund für die berufliche Untätigkeit von Senioren ist der Bezug einer Altersrente. Im Jahr 2019 war dies bei den Menschen im Alter von 60 und mehr Jahren bei 90,3 % der Frauen und 85,8 % der Männer der Grund für die Nichterwerbstätigkeit und die fehlende Arbeitssuche.

Im Jahr 2019 stieg die Zahl der wirtschaftlich aktiven Senioren im Vergleich zum Vorjahr um 1,5% und belief sich auf 1.301.000, was 7,6% der Gesamtzahl der wirtschaftlich aktiven Polen im Alter von 15 und mehr Jahren ausmachte. Trotz des Anstiegs der Zahl der wirtschaftlich aktiven älteren Menschen ging die Erwerbsquote dieser Personengruppe leicht zurück und belief sich auf 13,9% (14,0% im Jahr 2018).

Unter den beruflich aktiven älteren Menschen waren, wie in den Vorjahren, mehr als zwei Drittel Männer. Ihre Zahl belief sich 2019 auf 880 Tausend, d.h. 67,6 %. Dies ist unter anderem auf das spätere Rentenalter der Männer zurückzuführen. Die beruflich aktiven Frauen in der analysierten Gruppe waren 421 Tausend, d.h. 32,4% der wirtschaftlich aktiven Senioren<sup>1</sup>.

Eine der wichtigsten Lösungen, um reifere Menschen auf dem Arbeitsmarkt zu halten, ist die Förderung der Idee des Altersmanagements bei den Arbeitgebern.

Altersmanagement ist eine Reihe von Aktivitäten in Unternehmen und Institutionen, die eine rationelle Nutzung von Humanressourcen, einschließlich älterer Mitarbeiter, ermöglichen. Die Einbeziehung des Altersmanagements in die Praxis des Personalmanagements in einem

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<sup>1</sup> Kamińska Gawryluk, E., (red.), (2021) The situation of older people in Poland in 2019, Urząd Statystyczny w Białymstoku, Główny Urząd Statystyczny.

Unternehmen erfordert die Umsetzung von spezifische Maßnahmen, die die Arbeitseffizienz älterer Mitarbeiter erhöhen und somit dem Unternehmen Vorteile aus deren Beschäftigung bringen. Das Spektrum dieser Aktivitäten ist sehr breit gefächert - sie können sich auf verschiedene Phasen der Beschäftigung des Arbeitnehmers beziehen (von der Einstellung bis zum Ausscheiden aus dem Unternehmen); sie können sich auf den Arbeitnehmer selbst beziehen (geistige und körperliche Fähigkeiten zur Ausübung einer bestimmten Tätigkeit), aber auch auf das Umfeld des Arbeitnehmers (vom Arbeitgeber gestaltete Arbeitsorganisation).

Nach Angaben der Europäischen Stiftung zur Verbesserung der Lebensbedingungen und der Arbeit gibt es acht Schlüsseldimensionen des Altersmanagements:

### **1. Rekrutierung und Auswahl**

Laut der vom Polnischen Wirtschaftsinstitut im Jahr 2021 durchgeführten Untersuchung zum Problem der Altersdiskriminierung auf dem polnischen Arbeitsmarkt (die sich auf die Präferenzen der Arbeitgeber bei der ersten Auswahl der Kandidaten und die Sprache der veröffentlichten Anzeigen bezog), tritt das Problem der Altersdiskriminierung sowohl bei Angeboten, die die Mindestanforderungen an die Kandidaten enthalten, als auch bei Einstellungsverfahren für Positionen, für die Branchenerfahrung erforderlich ist, auf. Jüngere Bewerber wurden viel häufiger zur nächsten Phase der Einstellung eingeladen. Bewerber im Alter von 28 Jahren wurden bei Stellen, für die keine Branchenerfahrung erforderlich war, doppelt so häufig zu den nächsten Einstellungsphasen eingeladen wie Bewerber im Alter von 52 Jahren, unabhängig vom Geschlecht. Bei Positionen, die Branchenerfahrung erfordern, nahm der Unterschied in den Anteilen positiver Antworten auf Bewerbungen bei Frauen hingegen zu und bei Männern ab, aber dennoch wurde der jüngere Mann fast doppelt so oft zum Einstellungsgespräch eingeladen wie der ältere. Interessanterweise scheint Altersdiskriminierung mit geschlechtsspezifischer Diskriminierung verbunden zu sein, und die kombinierten Auswirkungen dieser beiden schädlichen sozialen Phänomene machen die Position älterer Frauen auf dem polnischen Arbeitsmarkt äußerst schwierig<sup>2</sup>. Es gibt immer noch wenig Bewusstsein dafür, wie der Inhalt von Stellenanzeigen formuliert werden sollte, um keine Diskriminierung von Kandidaten aufgrund des Alters zu suggerieren. Das gilt auch für die Änderung der Bewerbungsformulare, so dass der Teil, der den Personen, die die Auswahl vornehmen, zur Verfügung steht, keine Informationen enthält, die auf das Alter der Kandidaten schließen lassen, z.B. Geburtsdaten, Abschluss oder erste Anstellung.

### **2. Lebenslanges Lernen**

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<sup>2</sup> Baszczak, Ł., Mokrzycki, R., Trojanowska, M., Wincewicz-Price, A., Zyzik, R. (2021), Ageizm w Polsce – podsumowanie eksperymentalnego badania terenowego, Working Paper, nr 4, Polski Instytut Ekonomiczny, Warszawa

In Polen behaupten die meisten Unternehmen, dass ältere Arbeitnehmer den gleichen Zugang zu beruflicher Weiterbildung haben wie Arbeitnehmer jeder anderen Altersgruppe. In der Regel gibt es keine Einschränkungen beim Zugang zu Schulungen und anderen vom Arbeitgeber organisierten Formen der Bildung. Nach den Erfahrungen der Projekte: "PUAP50+", "RESTART" und "Zrozumieć Seniora" wird es immer beliebter, die Arbeit so zu organisieren, dass sie dem Lernen förderlich ist, z.B. durch die Bildung von Teams, die sich aus Mitarbeitern unterschiedlichen Alters zusammensetzen (in diesem Fall ist ein gegenseitiges Mentoring möglich - jüngere Mitarbeiter können ihr Wissen über moderne Technologien, z.B. IT, mit älteren teilen, während die Älteren den Jüngeren Ihre Berufserfahrung vermitteln können). Eines der Unternehmen, das sich mit der Notwendigkeit konfrontiert sah, neue Mitarbeiter zu akquirieren, einzuführen und auszubilden, entschied sich für ein Mentoring-Programm, bei dem die Vorbereitung eines neuen Mitarbeiters auf eine selbständige Position 1,5 Jahre dauert und er während dieser Zeit unter der Aufsicht eines erfahrenen Mitarbeiters arbeitet, der in der Regel über 50 Jahre alt ist. Es ist auch üblich, die Möglichkeit der Kofinanzierung von Schulungen für ältere Arbeitnehmer mit EU-Mitteln zu nutzen. Es wird auch immer üblicher, Mitarbeiter unabhängig vom Alter zum Lernen zu motivieren - insbesondere, indem man älteren Arbeitnehmern versichert, dass sie nicht zu alt für eine Weiterbildung sind, und ihnen gleichzeitig erklärt, dass sie eine Weiterbildung brauchen, weil ihre Kompetenzen dort aktualisiert werden müssen.

### **3. Professionelle Karriereentwicklung**

Nach den in Polen durchgeführten Untersuchungen sind ältere Menschen oft nicht an Weiterbildung interessiert und legen bei der Arbeit Wert auf Stabilität und sogar Routine. In einigen Fällen ist die Zugehörigkeit zu einem gut funktionierenden Team ein starker Demotivator für die Weiterbildung, z.B. um eine Führungsposition zu übernehmen. Diese Tendenz ist charakteristisch für Arbeitnehmer mit geringer Qualifikation und noch stärker in Teams, die von Frauen dominiert werden.<sup>3</sup>

### **4. Flexible Formen der Arbeit**

Arbeitgeber in Polen bieten immer häufiger verschiedene Anreize an, wie z.B. eine Neuverteilung der Aufgaben, damit die Stelle für den Arbeitnehmer attraktiver wird, flexiblere Arbeitszeiten oder die Möglichkeit der Fernarbeit<sup>4</sup>. In einem der befragten Unternehmen haben ältere Arbeitnehmer die Möglichkeit, in Teilzeit zu arbeiten, und diese Dimension nimmt ab, je näher der Arbeitnehmer dem Ruhestand kommt, bis hin zur völligen Arbeitsverweigerung kurz vor dem Ruhestand. In einem anderen Unternehmen spielt die Mehrheit der Arbeitnehmer über 50 die Rolle von internen Experten des Unternehmens, die

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<sup>3</sup> Kwiatkiewicz, A. (2010) Analiza dobrych praktyk dotyczących zarządzania wiekiem w polskich przedsiębiorstwach – studium przypadku, BPI Polska/Szkoła Główna Handlowa, Warszawa

<sup>4</sup> Raport „Nowe spojrzenie na pracowników 50+” (Manpower)

auf der Grundlage eines befristeten Vertrags beschäftigt sind, der ihre Aufgaben und Arbeitsbedingungen genau definiert. Je nach Einzelfall ist der Vertrag mehr oder weniger zielorientiert und die Arbeitszeiten sind daher flexibel. Zum Aufgabenbereich gehört auch die Rolle eines Mentors, der einen jungen Ingenieur Schritt für Schritt in die Besonderheiten der Aufgaben des Unternehmens einführt<sup>5</sup>. Es ist auch üblich, die Mitarbeiter über verfügbare Lösungen zur Flexibilisierung der Arbeitszeiten zu informieren.

## 5. Vorsorge und Gesundheitsschutz

In Polen tätige KMU-Unternehmen entscheiden sich sehr oft für eine zusätzliche Gesundheitsprophylaxe. Ältere Arbeitnehmer werden ermutigt, Präventionsprogramme im Bereich der Kardiologie oder einer gesunden Lebensweise in Anspruch zu nehmen. Ein Teil dieser Programme definiert die Tests, denen sich die Arbeitnehmer unterziehen sollten. Ein Teil der vorgeschriebenen Gesundheitstests richtet sich nach dem Alter des Arbeitnehmers und soll die Entwicklung schwerwiegenderer Krankheiten verhindern<sup>6</sup>. In einigen Unternehmen können alle Mitarbeiter zu einem günstigen Preis ein privates medizinisches Versorgungspaket oder eine Eintrittskarte für Sport- und Erholungszentren erwerben. Nach Angaben des PUAP50+-Projekts achten viele kleine und mittlere Unternehmen darauf, dass an den einzelnen Arbeitsplätzen angemessene Bedingungen im Bereich des Arbeitsschutzes herrschen. Die Unternehmen achten auch auf die Ergonomie der Arbeit an den einzelnen Arbeitsplätzen.

## 6. Transfer zwischen Arbeitsplätzen

Der Literatur zufolge war die am häufigsten beobachtete "Anpassung" die Versetzung eines Arbeitnehmers an einen anderen Arbeitsplatz innerhalb des Unternehmens zu dem Zeitpunkt, an dem sein Arbeitsplatz aufgelöst wurde oder er seine bisherige Arbeit, z.B. aufgrund gesundheitlicher Einschränkungen, nicht mehr ausüben konnte. Die Arbeitnehmer waren mit einer solchen Veränderung nicht immer zufrieden, selbst wenn sie die Folge eines ärztlichen Attests war. Trotz dieser Beispiele ist es schwierig, von einem geplanten und bewussten Management der Bewegung von Arbeitnehmern und der Anpassung von Arbeitsplätzen an die sich mit dem Alter ändernden Bedürfnisse zu sprechen<sup>7</sup>. Laut dem Projekt PUAP50 + bieten viele KMUs Unterstützung für Teams bei Veränderungen, die personelle Veränderungen erfordern (Versetzung, Entlassung, Änderung des Aufgabenbereichs). Es ist auch üblich, Mitarbeiterteams unterschiedlichen Alters zu bilden (dank derer die Arbeit von jüngeren

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<sup>5</sup> Litwiński, J., (2010), Opis dobrych praktyk dotyczących zarządzania wiekiem w przedsiębiorstwach polskich oraz innych krajów UE, Warszawa

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

<sup>7</sup> Kwiatkiewicz, A. (2010) Analiza dobrych praktyk dotyczących zarządzania wiekiem w polskich przedsiębiorstwach – studium przypadku, BPI Polska/Szkoła Główna Handlowa, Warszawa

Personen erledigt werden kann). Unter den Bedingungen von KMUs ist die Versetzung älterer Arbeitnehmer in eine andere Position und die Umschulung von Mitarbeitern aufgrund der geringen Anzahl von Mitarbeitern und der damit verbundenen organisatorischen Probleme jedoch oft sehr kostspielig oder sogar unmöglich.

## 7. Beendigung des Arbeitsverhältnisses und Ruhestand

Auf der Grundlage der im Rahmen des Projekts "Z wiekiem na plus - szkolenia dla przedsiębiorstw" („*Gut altern - Schulungen für Unternehmen*“) durchgeführten Untersuchungen kann man zu dem Schluss kommen, dass die Beendigung des Arbeitsverhältnisses eine der am häufigsten genutzten Maßnahmen in Bezug auf ältere Arbeitnehmer ist. In den Unternehmen des verarbeitenden Gewerbes, wo die meisten Arbeitsplätze körperliche Anstrengungen erfordern, sind zwei Phänomene zu beobachten: Überbeschäftigung und die relativ einfache Akquisition von Mitarbeitern auf dem externen Markt. Die Arbeitgeber scheinen der Meinung zu sein, dass ein älterer Arbeitnehmer immer durch einen jüngeren ersetzt wird und dass dies die natürliche Ordnung der Dinge ist. Ein solcher Glaube kann eine ernsthafte Schwierigkeit bei der Umsetzung von Altersmanagementlösungen darstellen.

## 8. Umfassender Ansatz

In der Regel entscheiden sich Arbeitgeber in polnischen Unternehmen für die Einführung von Altersmanagement, wenn die Organisation sich bewusst ist, dass es ein Problem im Zusammenhang mit dem Alter der Mitarbeiter gibt, das sich stark auf die Arbeitseffizienz auswirkt oder auswirken wird, z.B. wenn dem Unternehmen ein erheblicher Renteneintritt droht und der Zustrom neuer kompetenter Mitarbeiter schwierig ist. Es wurde auch beobachtet, dass in Unternehmen, die derartige Probleme derzeit nicht wahrnehmen, selten ein Interesse an einem Personalmanagement besteht, das die Fragen des Alters der Mitarbeiter berücksichtigt<sup>8</sup>. Nur wenige mittelständische Unternehmen in Polen wenden eine gut durchdachte, umfassende Altersmanagementstrategie für ihre Mitarbeiter an. Dies ändert sich jedoch, wie die Ergebnisse von Untersuchungen und Aktivitäten zeigen, die zum Beispiel im Rahmen der Projekte PUAP50 + oder RESTART durchgeführt wurden.

## 4.2. Erfahrungen von Experten bei der Verbesserung von Altersmanagementlösungen in KMU

Im Rahmen der Untersuchung wurden 3 ausführliche Einzelinterviews mit den Teilnehmern geführt:

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<sup>8</sup> Dawid – Sawicka, M. (2013), Zarządzanie wiekiem: dobre praktyki polskich organizacji in: <https://www.prawo.pl/kadry/zarzadzanie-wiekiem-dobre-praktyki-polskich-organizacji.275659.html>

- Leiterin eines Unternehmens, das (von der Europäischen Union kofinanzierte) Projekte durchführt, die auf die Einbeziehung älterer Menschen in soziale Initiativen und die Unterstützung bei der Anpassung an die Realitäten des Arbeitsmarktes abzielen.
- Der Inhaber eines Unternehmens, das (vom Landesarbeitsamt kofinanzierte) Projekte durchführt, die auf die Rückkehr älterer Menschen in den Beruf abzielen, die lange Zeit arbeitslos waren oder im Ruhestand sind und eine Arbeit aufnehmen möchten.
- Der Eigentümer eines Unternehmens aus dem KMU-Sektor, das viele Menschen über 55 Jahre beschäftigt und Aktivitäten durchführt, die darauf abzielen, diese Menschen an das Arbeitsumfeld anzupassen.

Wenn es um die Erfahrungen von Experten im Bereich des Altersmanagements geht, wiesen unsere Befragten auf ein sehr wichtiges Element solcher Aktivitäten hin, das die Identifizierung und Analyse der Kompetenzen älterer Menschen in den ersten Phasen der Teilnahme am Projekt betrifft. Personen, die als Begünstigte an dem Projekt teilnehmen möchten, werden, nachdem sie alle formalen Voraussetzungen erfüllt haben, Kompetenztests unterzogen. Dies geschieht, um die Fähigkeiten (das Potenzial) älterer Menschen bestmöglich auf die Bedürfnisse der Organisation abzustimmen, in der sie arbeiten oder eine Beschäftigung anstreben.

Es geht u.a. darum, Fähigkeiten zu diagnostizieren und eine bestimmte Person darauf vorzubereiten, am Computer zu arbeiten, digitale Technologien zu nutzen, festzustellen, welche Aufgaben eine bestimmte Person gut beherrscht (dies bezieht sich nicht auf die Ausbildung einer Person, sondern auf praktische Fähigkeiten, die die Person während ihrer beruflichen Laufbahn erworben hat). Die praktische Berufserfahrung dieser Personen ist daher ein sehr wichtiger Faktor. Dies geschieht mit Hilfe verschiedener Arten von Tests, Interviews und Kompetenznachweisen. Diese Untersuchungen werden von Experten durchgeführt - Personalvermittlern oder Berufsberatern, die auf die Arbeit mit älteren Menschen spezialisiert sind. Dadurch ist es möglich, die Stärken und Schwächen dieser Menschen in Bezug auf ihre berufliche Tätigkeit zu ermitteln und die Erwartungen und Bedürfnisse dieser älteren Menschen kennenzulernen, die von den Organisationen, in denen sie arbeiten oder arbeiten werden, erfüllt werden sollten. Auf der Grundlage dieser Kompetenzanalyse wird ein individueller Plan für die Anpassung dieser Menschen an die Arbeit erstellt und ein individueller Weg festgelegt.

Bei einer der befragten Beratungsorganisationen geht der Einstellung einer älteren Person ein 3-monatiges Berufspraktikum bei einem künftigen Arbeitgeber voraus (finanziert aus Projektmitteln). Daher zahlt der Arbeitgeber 3 Monate lang nicht für die Arbeit dieser Personen (er zahlt nur Sozial- und Krankenversicherungsbeiträge). Nach Ablauf des Praktikums ist der Arbeitgeber verpflichtet, die Person für mindestens weitere 3 Monate (mindestens halbtags) einzustellen und ihr mindestens das niedrigste nationale Gehalt zu zahlen, das jährlich von der Regierung festgelegt wird. Experten der Beratungsorganisation

überwachen dann jedes Praktikum beim Arbeitgeber (es werden strukturierte Interviews mit diesen Personen und ihren unmittelbaren Vorgesetzten geführt).

Im Falle eines anderen Beratungsunternehmens besteht der Anpassungsprozess hauptsächlich darin, den Arbeitsplatz an die spezifischen Bedürfnisse der älteren Person anzupassen. Dies geschieht in Situationen, in denen eine bestimmte Person eine Behinderung oder besondere Bedürfnisse hat (z. B. einen speziellen Sessel, eine Fußstütze, einen speziell konfigurierten Computerbildschirm). Dies geschieht in enger Zusammenarbeit mit dem Arbeitgeber. Auch die Vorschriften zum Arbeitsschutz spielen eine wichtige Rolle. Die Anpassung eines solchen Arbeitsplatzes wird entweder aus den Projektmitteln oder aus dem speziellen staatlichen Fonds für die Rehabilitation von Behinderten - PFRON - finanziert.

Wenn es um Lösungen geht, die von Eigentümern/Managern von Unternehmen, die bereits ältere Menschen beschäftigen, umgesetzt werden, nannten unsere Befragten flexible Arbeitszeiten (Verkürzung der täglichen Arbeitszeit, Fernarbeit - wenn möglich), die Möglichkeit der Inanspruchnahme zusätzlicher privater medizinischer Versorgung und die Versetzung älterer Menschen auf Positionen, die ihren Fähigkeiten entsprechen. Es ist auch wichtig, älteren Mitarbeitern die Möglichkeit zu geben, an Schulungs- und Entwicklungsmaßnahmen teilzunehmen, die für alle Mitarbeitenden gleichermaßen zugänglich sind und im Unternehmen durchgeführt werden. Darüber hinaus ist in dem befragten Unternehmen das Mentoring durch ältere, erfahrenere Mitarbeiter, die unerfahrenen jungen Mitarbeitern, die gerade erst in einer bestimmten Position anfangen, zur Verfügung stehen, sehr beliebt. Der befragte Vertreter des Unternehmens fügte außerdem hinzu, dass bei der Einstellung von Mitarbeitern nicht zwischen jüngeren und älteren Mitarbeitern unterschieden wird. Das einzige Einstellungskriterium ist das Kompetenzniveau des Bewerbers.

### 4.3. Notwendigkeit zur Verbesserung des Altersmanagements in KMU

Wenn es um Beratungsorganisationen geht, die sich mit Altersmanagement befassen, könnte eine größere Anzahl von Projekten helfen, die sich sowohl an ältere Menschen als auch an potenzielle Arbeitgeber richten. Finanzielle Anreize für potenzielle Arbeitgeber, die ältere Menschen einstellen möchten, wären ebenfalls sinnvoll. Systemlösungen auf der Ebene des gesamten Landes oder der Region sind ebenfalls wichtig. Neue Kanäle, um ältere Menschen zu erreichen, die oft nicht wissen, wie sie soziale und berufliche Aktivitäten unternehmen können, wären ebenfalls hilfreich. Sie bleiben zu Hause, nutzen das Internet nicht und wissen nicht, welche Marktchancen es gibt. Leider ist das sehr schwierig.

Aus der Sicht der Beratungsorganisation, die Projekte zum Altersmanagement und zur Anpassung von Senioren an den Arbeitsmarkt durchführt, wäre es wichtig, die Budgets für diese Projekte realistischer zu gestalten. In Polen (wie auch im übrigen Europa) haben wir eine

hohe Inflation, und die Budgets unserer Projekte sind begrenzt. Es wäre schön, wenn es mehr Wettbewerbe und mehr EU-Mittel für umfassendere und breitere Projekte gäbe. Gute, moderne Instrumente zur Bewertung der Kompetenzen von Stellenbewerbern unter Berücksichtigung des Alterskontextes wären ebenfalls nützlich. Unsere Berater, Karrierecoaches und Arbeitsvermittler verfügen über eine Reihe solcher Diagnoseinstrumente, aber vielleicht gibt es ja auch Instrumente auf dem Markt, die das Alterskriterium berücksichtigen. Ein speziell konzipierter Schulungskurs für Arbeitgeber, die Senioren einstellen wollen, wäre ebenfalls nützlich. Es wäre auch gut, ein Mentoring-Programm zu entwickeln, um Arbeitgebern (die bisher keine Mentoring-Instrumente verwendet haben) dabei zu helfen, Senioren zu engagieren, damit sie ihr Wissen und ihre Erfahrung weitergeben.

Angesichts der Bedürfnisse der Arbeitgeber könnten größere finanzielle Anreize für die Einstellung älterer Menschen mit Behinderungen sinnvoll sein. Werkzeuge für die Kommunikation und die Durchführung von Gesprächen mit Mitarbeitern wären ebenfalls nützlich, um die Politik der offenen Tür noch transparenter zu machen und uns bei der täglichen Verwaltung des Unternehmens zu helfen. Zum Beispiel, wie man mit Menschen unterschiedlichen Alters spricht, wie man sich auf sie einstellt, wie man über schwierige Themen (Krankheit, Tod, Unglück) spricht. Daher wäre ein solches Coaching und psychologische Unterstützung nützlich.

## 5. Research findings in Germany

### 5.1 Background situation

"Older Employees - Too Young to Be Old." This is the title of one of BIBB's (Federal Institute for Vocational Education Bonn) reports on vocational training.<sup>9</sup> Here one can read how various surveys and statistics show that today's workforce and future generations will remain in the employment system longer and will need to secure, preserve, and help shape their individual ability to work in a longer working life. Neither legally nor scientifically, nor is "the" older employee precisely defined. Current social structures and their prevailing patterns of interpretation, socioeconomic conditions and the spirit of the times help to define who belongs to the older and the elderly. The OECD<sup>10</sup> defines older workers as persons who are in the second half of their working life, have not yet reached retirement/pension age and are healthy and fit for work. In everyday life and in companies most older workers are over 50 years of age. If the employability or the risk of long-term unemployment is taken as a basis, 45-year-olds (also 40-year-olds!) are assigned to the "older group."

According to Eurostat<sup>11</sup>, every fifth employee in Germany, i.e., 20 percent, is over 55 years old. This puts Germany above the EU average of 17.1 percent. A chart by Statista<sup>12</sup> (2018) shows that the proportion has increased continuously over the past 20 years by 6.9 percentage points in Germany and 7.5 in all EU countries.

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

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

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<sup>9</sup> Published: 2011 by BIBB - Bundesinstitut für Berufsbildung (Federal Institute for Vocational Education and Training), 53142 Bonn

<sup>10</sup> Organization for Economic Co-operation and Development

<sup>11</sup> The Statistical Office of the European Communities. Eurostat is part of the European Commission and is responsible for the production of Community statistics

<sup>12</sup> Statista is a German online portal for statistics that provides data from market and opinion research institutions as well as from the economy and official statistics.

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

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

On December 14, 2018, the TÜV Nord Group<sup>13</sup> published on its website the following interesting article on the subject of older employees and digitalization:

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

An article by Annette Vorpahl (09/2019) in the magazine "Faktor A"<sup>14</sup> makes clear that there still seem to exist prejudices against older employees about potential and performance. "At

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<sup>13</sup> TÜV Nord AG is an international, independent service company based in Hannover, Germany. The main tasks are examinations and certifications in the business areas of industry, automotive, human resources and education.

<sup>14</sup> Employer magazine published by the Federal Employment Agency, Nürnberg, Germany

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

Rudolf Kast, owner of the consulting firm KAST.Die Personalmanufaktur, Freiburg, Germany and chairman of the Demography Network (ddn) e.V.<sup>15</sup> comments: “Germany faces a massive aging of its population in the coming years. While this aging can be mitigated by immigration, the shortage of skilled workers cannot. [...] One thing is certain: In the next few years, the baby boomer cohorts will retire from the workforce, creating a massive skills gap. Purely due to age, around 6.1 million employees - many of them skilled workers - will leave the labor market by 2030 due to reaching retirement age. In view of this impending skills gap and the parallel megatrends of globalization and rapid technological development - keyword: digitalization - are older workers an option for solving the skills shortage?”

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

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

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

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<sup>15</sup> ddn deals with the working world of the future with special consideration of demographic change, <https://demographie-netzwerk.de/>

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

In order to be able to use employees' skills for longer, more and more companies are installing flexible working time systems with long-term accounts. Employees can thus save up time and are given the opportunity to take time off for three to six months, for example, to care for relatives or undergo further training, or they can reduce their working hours for a limited period for recreational purposes. These working time models are offered not only by corporations, but now also by medium-sized companies such as Trumpf, a producer of laser machines, or the sensor manufacturer SICK. But care facilities such as Sozialholding Mönchengladbach also offer their employees these attractive options.”<sup>16</sup>

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

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

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

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

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

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<sup>16</sup> <https://faktor-a.arbeitsagentur.de/mitarbeiter-qualifizieren/silverpreneure-mit-vollgas-in-die-letzten-berufsjahre/>, 07.03.2022

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

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

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

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

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

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

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

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

## 5.3 Needs to improve age management solutions in SMEs

### **More information**

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

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

### **More awareness**

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

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

### **More tools**

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

## 6. Research findings in Slovenia

### 6.1 Background situation

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

In the group of European Union countries, Slovenia ranks among the countries with the lowest index according to the active aging index. We belong to the group of countries which, given the low level of inclusion of the elderly in the labor market, is recommended to promote the employment of the elderly among the working population and among those who have already reached retirement age. Similarly, data from the European Commission place us in the group with the lowest share of working elderly people. Employment for the 55-64 age group in Slovenia is 38.5%, while the EU-28 average for 2016 was 55.3%. Only Croatia and Greece have lower employment rates among EU countries in this age group (Eurostat, 2018). This can be understood as a result of early retirement, existing work culture and insufficient incentives to persevere in the workplace.<sup>17</sup>

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

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

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<sup>17</sup> Zaposlovanje starejših v Sloveniji, str. 6-7, 2018

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

### **Involvement of the elderly in work extension programs**

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

Namely, in this age group:

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

### **Comprehensive support to companies for active aging of the workforce**

The program is implemented by the Public Scholarship, Development, Disability and Maintenance Fund and is implemented in the period 2016 to 2022. Within the program, several activities were carried out aimed at improving the competencies of older employees, supporting employers in introducing measures to extend the work of older people and change attitudes and negative stereotypes about older employees. As part of the project, a catalog of measures for the effective management of older employees was prepared, which serves as a tool for the preparation and implementation of activities and measures in companies. During the project, several public tenders were published, where companies were able to obtain funding for training to strengthen the competencies of older people and funds for the preparation of strategies and plans for effective management of older employees.<sup>18</sup>

### **Managing older employees and strengthening their competencies**

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

They offer several services such as:

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<sup>18</sup> Javni študentski, razvojni, invalidski in preživninski sklad Republike Slovenije, 2016

- preparation of a strategy for effective management of older employees,
- personal plans and workshops for effective management of older employees,
- supervision and group / individual coaching,
- the hidden characteristics of Generation Y - Millennials and how their disclosure significantly improves your quality of life (in the workplace),
- diversity management workshop.<sup>19</sup>

### **Attitudes towards older employees**

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

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

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

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<sup>19</sup> <https://www.ekvilib.org/sl/upravljanje-starejsih-zaposlenih-ter-krepitev-njihovih-kompetenc/>

- companies that are domestically owned and have a share of state capital say that they do not have the problem of filling vacancies;
- 29% of companies say that they are trying to retain older employees and that they are implementing various measures for this purpose: redeployment / adjustment of jobs, relieving older workers (easier work tasks), adjusting schedules, taking care of preventive health examinations and additional financial incentives;
- the vast majority of companies (86%) are not considering the introduction of special programs (recreation, education) for older employees; in contrast, the vast majority of companies (78%) know and practice generationally mixed teams, mostly due to the transfer of knowledge from older to younger employees, less due to the relief of older workers.<sup>20</sup>

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

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

As mentioned in-depth interview we include:

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

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

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<sup>20</sup> Company attitudes to older employees: research report with interpretation of results and recommendations.  
- Ljubljana: Kapitalska družba.

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

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

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

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

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

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

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

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

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

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

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

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

Besides that, they have some concrete actions such as:

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

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

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

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

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

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

## 6.3 Needs to improve age management solutions

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

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

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

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

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

## 7. Research findings in Spain

### 7.1 Background situation

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

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

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

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

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

#### **2. Local Cooperation Initiative**

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

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

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

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

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

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

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

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

Three interviews were conducted with the following people:

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

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

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

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

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

Thus we found the most interesting conclusions:

- On a general level, they all point out that the process of adaptation of older employees to a new role is often not easy, especially when they encounter digital tools due to a greater lack of knowledge of digital tools.
- Everyone believes that to manage HR, regardless of age, it is essential to have the right attitude and provide an optimal and appropriate environment among workers. In short, to make a team and to be fully aware that the colleague needs to feel useful, and to the extent that the worker is a team, he or she will be more efficient and adaptable. Thus, they recommend tools to facilitate team bonding within the company, through group activities inside and outside the company.
- In the words of one of them, "make them feel like a family".
- Specific activities proposed include individual coaching sessions, accompaniment of the employee and activities inside and outside the company

## 7.3 Needs to improve age management solutions

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

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

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

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

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

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

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

## 8. Research findings in the Czech Republic

### 8.1 Background situation

#### Employment rate and its trends

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

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

Employed persons by selected age groups in thousands

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

Source: CZSO, Labour Force Survey

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

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

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

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

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

### **Length of working career, retirement**

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

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

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

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

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

## State Support in the Czech Republic

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

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

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

## Strategic Framework for Preparing for an Ageing Society 2020–2025

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

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

### **Council for Older Persons and Population Ageing**

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

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

### **Labor Office of the Czech Republic**

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

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

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

### **Strategic Employment Policy Framework 2030**

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

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

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

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

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

## 8.3 Needs to improve age management solutions

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

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

## 9. General conclusions

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

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

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

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

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

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

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

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

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

The fundamental thematic focuses for the meetings would be:

- Tools and dynamics that encourage communication.
- Tools capable of detecting the worker's problems.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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