



TRANSNATIONAL PARTNERSHIP “EXPERIENCE”

**“Comparative analysis of the results of experimentation
of pilot actions in managing the age factor”**

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**MINISTRY OF EMPLOYMENT
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EUROPEAN UNION
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**“Comparative analysis of the results of experimentation of pilot actions
in managing the age factor”
The case of Equal D.P. Experience (Greece)¹**

In the context of the Equal Program “Active Ageing” undertaken by the Greek Development Partnership Experience there have been several actions which involved pilot actions in the field of social partners as well as individual actors (employers and employees) with the task of increasing the capacity of those involved to maximize the opportunities that active ageing presents and minimize the problems that it entails.

In this report, we will try to make an overall assessment of the results, so that both the Greek partners of the D.P. as well as the other two D.P. partners (French D.P. “Kheops”² and Italian D.P. “Eolo”³) can take in account in assessing the next steps to be taken after conclusion of this present equal program.

The particular actions which have been considered in the drafting of this report are the following:

Action	Title
3	Parameters for the effectiveness of various active ageing management tools
4	Manual of standardized tools and procedures for the management of active ageing
5	Information and sensitivisation of enterprises in the secondary sector on the issues of active ageing
6	Information and sensitivisation of enterprises in the tertiary sector on the issues of active ageing
7	Information and sensitivisation of enterprises in the services

¹ The site of the D.P. is www.empeiria-dp.gr.

² For further information see www.irfasud.fr.

³ For information see www.equaleolo.it.

	and manufacturing sector on the issues of active ageing
8	Information and sensitivisation of enterprises in the primary sector on the issues of active ageing
9	Integrated system of managing the active ageing in the enterprises
13	Exchange of experiences in the advancement and implementation of policies managing active ageing
14	Evaluation of the results of pilot training programs in policies of managing active ageing
20	Evaluation reports of conventional and remote pilot formation
21	Creation of a framework of motives for active ageing

A. The four tools

The methodology followed throughout the whole program was to define the following four tools for managing the 55-64 age group:

- a) individualized guidance and career guidance
- b) implementation of flexible forms of work
- c) workplace health and safety
- d) personal management procedures

Then, separate studies were conducted for (i) the primary sector, (ii) the large enterprises in the secondary and tertiary sector, (iii) the commercial enterprises and (iv) small and self employed people.

The results for each field were the following:

a) **Primary sector:** Primary sector in Greece is characterized by declining percentage of people employed in this sector, high percentage of 55+ people working in it (55% of the persons employed in the agriculture belong to this age group) and the low percentage of working days throughout the year combined with the phenomenon of multiple job-holding among the farmers (jobs outside the primary sector to which they are employed for the rest of the year).

According to the study, it was found that individualized guidance and career guidance will be more effective if they are conducted within the new orientation of the recently revised Common Agricultural Policy. Easy access should be secured to such programs, taking into account geographical problems and the need to inform all persons involved about the existence of the programs. Another point of interest was that older farmers may be very useful mentors for younger farmers in the attempt to re-introduce traditional environmentally friendly cultivation methods.

The second and the fourth tools are of a relevantly smaller importance in the context of the primary sector. However, as regards the second tool, the study outlined the importance of succession through generations. When a farmer is approaching the retiring age, flexible and practical ways must be found so that the transfers his knowledge to a younger farmer, especially if the new farmer does not belong to the older's family. Incentives must be created for the older farmers to train the younger ones, instead of just selling their property. The use of technology may also decrease the amount working of time required, thus creating a friendlier environment for the farmer. A reorientation of the products cultivated may encourage 55+ persons if they require less amount of work.

As for the third tool, increased health coverage is necessary so that the ageing farmer may cope with the harshness of his work. In addition, the benefit of retiring after and not before 65 must be more visible by increasing the pensions after that age limit. Return to traditional methods of cultivating may encourage active ageing because the use of chemicals creates a lot of health problems which become apparent at the age of 55+.

Finally, a positive factor is that the persons involved in this sector seem generally to be satisfied with their work and have a high sense of contribution to society. However, this sense, if not accompanied by satisfactory income and affordable working conditions will not be enough to keep the people in the work.

b) Large enterprises in the secondary and tertiary sectors

The first finding of the study on large enterprises is that the percentage of those employed is at about the European average but it is lagging on the issue of the educational background of these employees (especially the female ones).

The above remark makes more apparent the need for training undertaken by the Labour Force Employment Organisation (*OAED*) tailored to individualized needs of the employees. It has been found that there are no vocational programs of this organization focused on this particular age group. Actually, whatever age oriented programs exist are oriented to the opposite direction: training the younger employees.

On the second tool, the study has found that the adoption of flexible working hours would make a difference as well as the introduction of new forms of work such as telework. However, in reality, part time and flexible working hours are not common practices in the big Greek enterprises.

On the health and safety tool, it is found that the following measures would favour active ageing: design of ergonomic measures, the effective implementation of law 1568/1985 requiring the presence of a safety officer and a labour doctor in the workplace, non placement of 55+ employees in overburdening jobs, creation of a pleasant working environment and monitoring of the workers' health through appropriate health and safety software.

On the fourth tool, it is found that traditional management methods are not enough and innovative ones must be adopted, methods which will have adequate knowledge of the individual skills of each employee belonging to this group.

Generally, big enterprises are more accustomed to follow traditional policies of encouraging voluntary retirement. As for the employees themselves, it seems that the higher they are in the hierarchy, the less they feel threatened by the passing of age.

c) Commercial enterprises – small enterprises and self-employed people

The employers' mentality is double faced in these kind of enterprises: on the one hand, they believe about themselves that they can keep working for more years and be active in work but, on the other hand, they do not make the same assumption about their employees, hesitating to hire 55+ persons, believing that they lack motivation and energy.

For the above kinds of enterprises, two common elements were found to characterise them: the small size of the business, the direct contact of the employer with the employees as well as the direct contact of these business with the individual customers.

Several factors have been indicated as not favoring the application of the four tools in active ageing policies in this sector.

(i) For the self-employed entrepreneurs: The business culture of merchants which is not favourable to innovative initiatives combined with a pessimism of many shop-keepers about the longevity of their business, low educational background, extended working hours which leave little time for guidance to employees. One positive factor can be the family character of many shops, which allows the shop owner to get involved in the business of the shop even after his official retirement.

The tool of training and guidance is not very much liked by the self-employed because they feel that they need no such training and that, in any case, they don't have the time for such things.

The tool of flexible forms of work organization is not very useful because everything depends on the entrepreneur himself and it is apparent that the need to be present in the shop –in an era where pressure for extended working hours are increasing- does not leave a lot of space for flexibility. One noteworthy practice is that priority is given to older employees when they are to choose the time-shifts by which they are going to work.

On the health and safety issues, the entrepreneur is left on his own and it is up to him to keep track of developments in health and safety issues.

For apparent reasons, the tool of personnel management procedures is not applicable to the case of a self-employed person.

(ii) Employees of commercial enterprises: Again, the small size of commercial enterprises characterizes the applicability of the four tools. The smaller the business is, the less willing are the employers and the target group employees to undertake training and guidance measures. The employers do not hire any other employee when their employees is absent for training and they try to find solutions among the existing personnel. This is another reason for being reluctant to let employees go for such training.

It is to be noted that employees with a higher status in the enterprises show some interest in accepting such guidance initiatives.

On the flexible forms of work organization, both employers and employees seem unwilling to get involved in such innovations.

Health and safety of the workplace is accentuated as a problem because of the prolonged hours of operations of the commercial enterprises, which usually lead to a prolonged working time for the employees, despite of labour law limitations. Innovations in ergonomic design, aiming at increasing the vision and fatigue problem of the 55+ people are necessary.

The low level of organization of commercial enterprises weakens the usefulness of the tool of personnel management procedures. There are no evaluation procedures and no systems of payment and bonuses, other than ad hoc decisions, related to applicable labour collective agreements. The employer believes that he knows personally the capacity of each worker and he does not need standardized procedures for evaluating his workers and determining their salaries. However, in many cases, the experience of older workers may lead the employer to assign to them several personnel management tasks.

Generally, it was proven in all studies that “size counts”. Large enterprises, which in the context of Greek economy should be considered as those with more than 10 employees, are more suited for the implementation of such tools while small enterprises are more difficult (both for objective and subjective reasons) to be subjected to such tools.

B. Focused pilot actions

In the context of the above described tools, there were three more focused pilot actions which were undertaken in the course of this program, each one of which had a particularized focus group and special aims:

a) *Creation of a network of human resources managers: An informal network of nine human resources managers from various sectors of the economy* was established with the task of exchanging views on problems concerning the employment of 55+ persons and exchanging good practices on managing of active ageing.

In each meeting, which takes place on a regular basis, one manager presents a case which he is facing now, or he has faced in the past, and then starts a discussion of the decisions which the manager took or the ones he should have taken. At a second stage of the same meeting, starts a broader discussion on the policies or practices which are being followed on a European and national level and ways to disseminate the knowledge and the value added which is being obtained in these regular meetings.

In the SWOT analysis which was made about these meetings, it was underlined that the human resources managers are the key players in companies on the issues of active ageing and that the ones who were chosen had a rich experience. On the weak points, it was pointed out that the number of participants was limited and that not all the sectors of the economy were represented (e.g. banking).

The challenges lying ahead for the network were the possibility of connecting with other networks (e.g. corporate social responsibility network) within Greece and European wide, the increase of the number of participants. The analysis indicated as a problem the danger that the creation of the network may be connected in the eyes of public opinion with the broader political discussion (which is very heated) on the social insurance problem.

b) *Seminar of 20 trade union members on active ageing policies and practices* with the aim of making them multipliers in their fields of action. The seminar lasted 25 hours and included the following topics:

- employment policies in Greece, Demographic ageing and the prospects of employment in Greece,
- initiatives of European and International organizations in relation to active ageing,
- European Strategy for Employment,
- European Practices of Member-States in relation to the management of active ageing,
- analysis of factors and setting up of a framework of motives for the management of active ageing and
- the role of trade union officials in the dissemination of the issues concerning active ageing.

After the seminar was concluded, a swot analysis was conducted, the main points of which were the following:

The strong points of the seminar were that the trade union officials were informed about an issue of which they had not realized the existence and the importance. They also obtained a clear view about the solutions that each level of collective bargaining may offer, the motives which may be offered alternatively or cumulatively etc. In the weak points may be listed the small number (20) of the officials who participated in the program (for objective reasons) and the limited multiplying capacity that they will have, the different educational background of the participating persons and their complete lack of familiarity with the issue. On a more general level, as weak points for the whole attempt, the following factors were identified: high unemployment of the target group, non-implementation (in practice) of the equal treatment law concerning the age factor, the lack of special measures for female 55+ persons.

As opportunities were identified, among others, the following: the increase of the flow of information to the trade union officials regarding active ageing and the follow up of this seminar so as to guarantee that there will be a multiplying effect.

As threats were identified the prospects of a worsening of the unemployment in the 55+ target group, the lack of a framework which would

allow coherent initiatives and a traditional decision making process on the state level by the state which leads to measures which have not been discussed and agreed.

c) *Selection and training of 15 employees with the aim of making them mentors in their workplaces.* Each mentor selected would become a mentor in his company trying to communicate his knowledge and experience to a newcomer-employee.

Selection of the mentors was made on the basis of personal interviews where the degree of experience, the ability of communicating with the others and the strong motivation to do so were evaluated. Finally, 8 persons were selected to be trained.

The training included the following units:

- a. General information about active ageing (statistics, best practices, discrimination etc).
- b. Mentoring (what is mentoring, the role of the mentor, problems for mentoring, mentoring and management systems).
- c. Practical exercise (25 hours) in the enterprise.

The SWOT analysis produced mixed results. The small number of mentors was a problem by itself. The difference in their perception of their task and the difference in their self-perception was another problem.

However, the mentors proved in practice to undertake their role very rigorously and, in the limited time of their practice, proved to be very effective. They also had good support from their respective human resources managers.

The main challenge lying ahead is to increase the number of mentors and to make them have some sort of contact and experience exchange between them; it will also be useful to adapt the training programs to the particularities of each mentor and/or company and the development of the ability of the mentors to undertake initiatives.

On the threat side of the analysis, the main risk is that the new employee may not respond to mentoring and may feel personally criticized. The

companies, have not yet formulated a system of motives for the new employees to respond favorably to such mentoring schemes.