



Perceived employment situation of Best Agers in the Baltic Sea Region: an interview study

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Perceived employment situation of Best Agers in the Baltic Sea Region: an interview study

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- "Employers should keep in mind that the older have much knowledge."
– Swedish unemployed administrator, age 59
- "The good employees have experience which should be used".
– Danish hospital care worker, age 57
- "Companies as such should definitely confess to their elderly workforce. This is what I'm really angry about – the industry is crying for skilled labour force, and there are countless older workers who are perfectly skilled. There is kind of a "youth obsession"; I think a good age-mix is the best."
– German industrial manager, age 55
- "The approach to the elderly is often stereotyped; after all, society is changing, the older people are becoming more active, dynamic."
– Lithuanian unemployed bricklayer, age 60
- "Laughing at and humiliation of older employees is commonplace. There is a phenomenon of mobbing which is unfortunately accepted by employers. This is something that needs to be changed."
– Polish unemployed engineer, age 55
- "I like my work; I have to work anyway for the money, and people in my work group are nice, I like them."
– Latvian kindergarten employee, age 59

Summary

The present study aimed at identifying the barriers that older employed or unemployed, job seeking workers (55+) face when they endeavour to remain in or to re-enter the labour market. Interviews were undertaken in six countries of the Baltic States Region: Denmark, Germany, Latvia, Lithuania, Poland and Sweden. The total number of interviews was 134.

Barriers were classified into laws and regulations, health related, economy related, competence related and attitude related. It was found that some types of barriers were highlighted by best agers in all countries. Such generic barriers included health related, competence related and attitude related ones, whereas references to laws and regulations were uncommon. In particular, there were many testimonies of discriminatory attitudes among managers and supervisors.

Many best agers showed a positive attitude to work and were eager to continue working to legislated pension age. Other best agers felt that they would rather use their final years to engage in family or personal interests: to take the opportunity to live a good life. However, in some countries in particular economic constraints limited the freedom of choice: there was a necessity to continue working for financial reasons, even as pensioner. Access to part-time work was limited in all countries.

A general conclusion to be drawn is that best agers should be seen as individual persons, not as an amorphous group. Age management principles should be applied in order to enhance employability. This will help creation of better attitudes to older employees, downplaying the significance of age and enhancing the individual with her or his resources.

Contents

1. Introduction.....	1
2. The present study.....	3
3. Aims of the study	4
4. Method	4
5. Results.....	6
5.1 Retirement patterns and plans	7
5.2 Articulations	8
6. Comment.....	27
6.1 Generic observations	27
6.2 National observations	30
7. On methodology and significance.....	35
References	36
Interview Guide – Employees and unemployed	37
Interview Guide – Employees	39
Interview Guide – Unemployed	43

1. Introduction

In the Best Agers study “Employability of older people: a scientific review, conclusions and recommendations” (2010) it was concluded:

The employability of an older person is related to a set of more complex factors than is usually understood. Some of these are related to the individually oriented concept of employability but there is also a set of barriers which the individual cannot easily influence, in the workplaces and also in governmental authorities that people meet when they seek employment. Negative attitudes in the workplaces and in the society at large towards older workers affect the actual employability negatively.

There is ample evidence from this condensed review of scientific studies of ageing and work that even though we all are affected by physical and mental changes as we grow older, chances are that we can stay employable and retain our productivity at work for much longer time than is generally considered feasible. Main barriers hampering continued employability are in the areas of health and competence. However, the inter-individual differences with respect to work ability increase with age, which necessitates a more individualised approach than is mostly seen in workplaces and in the labour market at large.

A prerequisite for continued work ability is that the technical and organizational conditions at work comply with the resources of older workers.

This conclusion was based on a literature survey concerning factors that are known to influence the chances of an older person to retain employment or to return to working life after having been made redundant. It was noted that such factors may be related to a person’s capacity to keep or obtain employment, from a social and psychological perspective (Garsten and Jacobsson 2004). Dimensions that constitute employability include, according to van der Heijde and van der Heijden (2005), occupational expertise, anticipation and optimization, personal flexibility, corporate sense, and balance; they define employability as “the continuously fulfilling, acquiring or creating of work through the optimal use of competences”. These observable characteristics relate to the person’s perceived employability, which, according to Berntson (2008) can be described as “an individual’s evaluation of his or her possibilities to find a new job of equal standing”. But, as pointed out in the previous study, there are also situational factors that the person cannot easily

influence, and which may be crucial, determining whether or not an unemployed person may or may not find a job. Such factors may relate to the special situation that an older person faces with respect to attitudes at the workplace, or inability to fulfil job demands due to age inflicted physical weakness.

It was concluded that older persons as a group face age specific problems that make return to work for them even more difficult, compared to what unemployed younger persons usually experience. In an effort to increase work participation in the older population, which is seen as a strategic EU goal, it is essential to understand what barriers that older persons, who wish to remain in the workforce, do experience. In this context it is relevant to take situational barriers into account.

A point of departure with respect to understanding the different types of situational barriers experienced by best agers, who wish to remain in the workforce, is to consider the typology presented by Holmer et al. (2010). Here an interview study with unemployed job-seeking persons older than 50 years, and stakeholders in governmental agencies as well as trade union representatives, was reported. It was found that four sets of barriers could be identified:

Competence related factors include e.g., a lack of updated technical abilities, particularly concerning operation of computers and lack of familiarity with currently used computer programs.

Health related obstacles include, e.g., problems in the musculoskeletal system (low back, shoulder/neck) problems with high work pace and with irregular work hours, particularly shift work.

With respect to *rules and regulations*, such barriers may be formal (part of the legal framework), or related to the practice of governmental authorities.

Negative attitudes include those met in employers or in representatives of agencies, but also among the jobseekers themselves.

This typology served well the purpose of identification of barriers that may have similar backgrounds, and that may be possible to address by application of similar approaches.

Attitudes to retirement are affected by a number of factors, the so-called push-pull effects (Knuth and Kalina 2002; Gruber and Wise 1999). The alternative to leave the organization and retire must be attractive enough, for instance by economic security (pull) or that there is a perceived pressure from the employer to leave (push), in order to make a person motivated enough to decide to retire (van Solinge och Henkens 2007).

Push-pull factors exist both for the employee and for the employer (Shultz et al. 1998). For employees:

- health problems,
- lack of competence in demand,

- no access to competence development,
- work environment factors,
- negative attitude to occupation or to work.

Pull factors include,

- economic factors,
- leisure activities, family, new career.

Push factors for employers:

- negative view concerning older employees,
- higher costs compared to younger employees.

And pull factors:

- experience and expert knowledge,
- social responsibility.

It should be noted that push and pull factors may be positive or negative. For instance, if an employee has a high degree of work commitment, it tends to cancel the effects of other work environment related push factors. Economic effects may also be positive or negative: if retirement is perceived less safe than to continue working, this weakens the effect of pull factors.

The push-pull model has been applied widely in scientific studies of labour market mobility.

2. The present study

A basic goal of the Best Agers project is to help increase work participation in the 55+ group in the BSR countries. In the formulation of Work Package 3, Activity 2: Study of the employment situation of Best Agers, it was observed:¹

The employment situation of Best Agers may depend to a large extent on local and regional circumstances. These aspects need to be taken into account when devising regional strategies for improving Best Agers involvement. One way may be creating economic incentives for Best Agers and employers. But can it be shown that an improved age management is also economically sound? Also several other factors may be of high importance, including competence related, health related and attitude related ones. The relative importance of these factors may differ significantly across the BSR, and will be clarified in this WP.

¹ WP3 Activity Plan

There is a need to identify barriers hampering a continuing working life in each country.

The present study was carried out in partial fulfilment of this goal. It focuses on views as articulated by the best agers themselves, employed as well as unemployed (job-seeking). It is mirrored by a parallel questionnaire study concerning attitudes of employers in the participating countries (Meixner 2012).

3. Aims of the study

The main aims of the study were twofold:

- Identification of barriers impairing the possibilities for best agers (men and women) to remain in or to return to working life, which are generic across the BSR.
- Identification of country specific barriers.

The study also encompassed investigating how older people in the different countries relate to continuing working and to retirement.

4. Method

An interview guide was developed (see Appendix). There were minor differences depending on if the interviewee was employed or unemployed. In the first part, each interviewee was asked for information on sex, age, marital status, and place of living.

In the general section of the interview, the interviewees were also asked for information on occupation, personal employment patterns, and general health status. Those employed were also asked to provide information on the age and retirement patterns at their workplace. Then they were asked at what age they would like to retire, and at what age they believed that they would actually do so.

The main part of the interview concerned the barriers to continued employment. As indicated, in the present study, a qualitative approach was chosen. There were several reasons behind this choice:

- When searching for barriers experienced by the 55+, it may be problematic to provide pre-formulated alternatives; there is an obvious risk that nuances get lost and that important dimensions of the problem spectrum are left unattended.
- In a multicentre study, it is not necessarily so that the same fixed alternatives in a questionnaire are relevant in all countries.
- Project resources (personal and monetary) did not allow development, distribution and analysis of questionnaires to the extent needed for statistical analysis.

As Kvale (1996) puts it:

“Qualitative research is sensitive to the human situation, it involves an empathic dialogue with the subjects studied, and it may contribute to their emancipation and empowerment.”²

The obvious drawback of the qualitative approach is the problem of generalization. Carrying out qualitative studies comprising interviews face-to-face is quite time-consuming, and the number of respondents that can be addressed is limited. An inherent problem is that there is a high probability of bias, since it is unlikely that the limited sample may be representative for all relevant study groups. This means that conclusions need to be drawn with care.

In fact, qualitative studies may entail the information needed in order to make possible designing adequate quantitative follow-up studies.

A certain pre-understanding of the dimensions that are likely to be met in the interviews helps; there is a need to provide a structure for the interviews facilitating categorization of responses. In our case, such a pre-understanding was present through the typology provided by Holmer et al. (2010). The interview guide (Appendix) was adapted to the two categories: employed, and unemployed (job seeking) persons, aged 55+.

Under the heading, “Have you experienced barriers which hampered continued employment?”, the following dimensions were covered:

- Formal barriers (laws, regulations)?
- Health related barriers (high number of work hours, high work pace, high physical or mental workload)?
- Economic barriers?
- Barriers relating to working hours (e.g. shift work, irregular working hours, lack of part time work or partial retirement plans)?
- Competence related barriers (is your professional knowledge and know-how in demand?) Which ones?
- Family related barriers (e.g. care of family members, already retired spouse)?
- Attitude related barriers,
 - among workmates?
 - among employers?
 - among supervisors?

The Interview Guide was developed in English language. Participating partners were asked to translate the guide into their own language, and to record the responses from the

² Kvale. S. (1996). InterViews, p. 70

interviewees according to the structure given in the guide. An Excel book was provided, where responses, now translated into English language, could be inserted accordingly. The interviews were to be taped, but for reasons of capacity, it was not considered feasible to carry out transcriptions. The recommended procedure was to write down the key responses while listening to the recordings.

In order to guarantee anonymity, no names or other means of personal identification were recorded.

5. Results

The contribution by partner is shown in Table 1. The total number of interviews reported was 134. This fell short of expectations for some countries, and some of the material was skewed. Nevertheless, the total amount of information recorded is excessive. Some of the subjects interviewed were in the age range 50–55, i.e. below the 55 year best agers definition. This was not considered a major problem; much of the international scientific literature on older people and work concern in fact the 50+.

Partner no. (country)	Male		Female	
	employed	unemployed	employed	unemployed
2 (DE)	4	4	4	1
16 ³ (DK)			8	
11 (LT)	8	8	8	8
13 (LV)	10	6	13	6
6,7,8 (PL)	6	7	9	3
14 (SE)	4	3	8	6
Sum	32	28	50	24

In addition, Partner 15 (SE) has contributed interview data from a national ESF project, also concerned with identification of barriers to sustained work in the older employed (7 subjects) and unemployed (26 subjects).⁴

Since previous studies have shown differences in retirement patterns between social groups⁵, there was an effort made to identify subjects as “blue collar” or “white collar”; however, this was in many cases far from straightforward due to the lack of a clear definition, and consequently, this distinction was dropped as a major basis for stratification

³ The Danish partner has also contributed a survey study (Larsen and Svendsen 2011).

⁴ Kadefors et al. (2007)

⁵ Kadefors (2011)

in the data processing. Nevertheless, this information was noted in the processing of individual interviews.

5.1 Retirement patterns and plans

Here the frequencies of responses to the questions concerning retirement plans are summarized. Note: some cases are omitted due to missing data.

When do best agers in the BSR countries wish to retire? According to the interviewees, at quite similar age; somewhat lower in Poland:

- DE: 63,3
- DK: 62,3
- LT: 62,5
- LV: 63,7
- PL: 60,2
- SE: 63,1

Male subjects tend to wish to work longer than female; this corresponds also to the findings in previous research. The difference between males and females with respect to desired retirement age was largest in Germany:

- DE: males 64,6; females 61,3
- LT: males 62,5; females 62,4
- LV: males 64,3; females 62,6
- PL: males 61,3; females 59,2
- SE: males 63,5; females 63,3

In all countries except Lithuania, the retirement age foreseen exceeds the desired, for men and women alike:

- DE: males 64,8; females 63,9; higher than desired retirement age
- LT: males 62,4; females 61,9, lower than desired retirement age
- LV: males 63,7; females 62,3; higher than desired retirement age
- PL: males 62,6; females 60,8; higher than desired retirement age
- SE: males 64,8; females 63,9; higher than desired retirement age

In most countries, the unemployed wished to work longer than the employed; again the largest difference was in Germany.

- DE: unempl 66,7; empl 61,8
- LT: unempl 62,6; empl 62,4
- LV: unempl 62,0; empl 63,7
- PL: unempl 63,0; empl 58,2
- SE: unempl 64,4; empl 62,4

Many interviewed best agers wish to retire before the legal retirement age in their country; in Denmark about 75%, in Germany 50%, in Latvia 30%, in Lithuania 20%, in Poland 42%, and in Sweden more than 50%. However, in Latvia, according to the interviewees, this option doesn't really exist.

It can be concluded that although many best agers, including many unemployed, do wish to continue working at least up to pension age, there are many who would like to stop working earlier.

How do best agers assess the meaning of work? In the present study, the responses were categorized as follows.

- DE: 39% “fun, feel required, a challenge”, 31% “social contacts”; 23% “earning money”.
- LT: 41% “earning money”, 31% “identification/self-realisation”
- LV: 53% “structure of life”, 15% “earning money”
- PL: 36% “earning money”, 16% “social contacts”
- SE: 56% “social contacts”, 20% “earning money”

It is seen that economic aspects do play a role in all countries, but that a variety of other aspects related to work are important as well.

Are new incentives needed in order to motivate best agers to continue working, and what sort of incentives? – 74% of the interviewees (the highest in Germany, 83%) think that incentives are needed. There are national differences in the sample:

- DE: less working hours 31%, more freedom 23%
- DK: less working hours 25%
- LT: less working hours 16%, better salary 13%
- LV: better salary 21%, a fun work 15%
- PL: better salary 36%, less working hours 16%
- SE: more freedom 16% less workload 12%

Overall, 15% prioritise better salary, 12% better working hours. These are the dominating aspects with respect to needed incentives.

5.2 Articulations

Formal barriers

There are several types of formal barriers that may occur in working life. The most obvious one is if there are laws and regulations that effectively discriminate older workers, and prevent them from continuing to work or return to work when made redundant.

However, also the way that authorities operate plays a role, There may be discriminatory practices in the way that regulations are applied, for instance in the way that officials meet older jobseekers. There may be discriminatory practices in banks, in the education system, or in companies due to internal code-making affecting personnel policies.

What sorts of formal barriers are seen in the present study?

Despite the presence of the recent European Directive, aiming at abolishment of all sorts of age discrimination in working life⁶, there are practises in several countries that do not seem to be in line with the principles outlined in this document. For instance in Lithuania and Latvia, several interviewees articulate this problem when asked about formal barriers:

“The law does not protect enough the elder employees.” (Lithuanian male unemployed technician, age 55)

“Because of the younger workers. I was dismissed. A young person can be paid a lower salary. He is without experience, but his working capacity is higher.” (Lithuanian female unemployed technician, age 59)

“Older people in work are discriminated; intolerance of society has to change.” (Latvian female unemployed accountant, age 58)

The pension age in an EU country is not regulated by the European Directive; it is clearly stated that this an area where the subsidiarity principle prevails, and that member states decide on such regulations by them.

Both in Lithuania and in Sweden, there are complaints concerning age discrimination. In Sweden, two types of formal barriers were identified by interviewees. The first one concerned economic constraints if you wish to re-educate:

“Would study but can't get student loans after the age of 50.” (female unemployed academic age 62)

The second formal barrier mentioned was that it is more expensive to employ an older person than a younger one due to the higher pension costs.

Immigrants may have problems to have their competence validated and accepted in the new country. An immigrant electrician from Kazakhstan (age 50) to Germany declares:

“As an industry electrician with a foreign diploma, I am kind of overqualified, so it is difficult to get a job in the branch I learned... Language problems; additionally in Germany, electricians usually speak English and I didn't learn that at school; and of course I am too old – I thought finding work would be much easier in Germany when I came here at the age of 42.”

⁶ European Council directive 2000/78/EC, “establishing a general framework for equal treatment in employment and occupation”. Official Journal of the European Communities 2.12.2000

This problem is not specific for persons belonging to the Best Agers group; it may affect immigrants irrespective of age. But the combination of two discrimination grounds can be particularly difficult to handle.

There are several interviewees in Latvia who highlight that older unemployed Russians, with little knowledge of Latvian language, have problems to find new employment. This again is a situation where two separate types of barriers may combine.

There are efforts in virtually all areas of working life to increase productivity by applying some kind of lean production ideas; fewer workers should produce more. This is often a result of policy decisions at the organization's top level, and may include development of internal company standards for production design. In the workplaces, such efforts may entail technical and organizational changes that come out negatively for older workers and leading to stress, to redundancy, and fewer openings for recruitment of new personnel. For instance in Denmark, this problem was highlighted by several best agers in the health care sector.

“The pressure has increased ... I can feel that we have been downsized. We have to run faster ... it wears out your body.” (Danish female health care worker, age 56)

We shall return to the stress induced problems below, also in the context of lack of provisions to work part time.

As we shall see in the following, the economic conditions in several countries may make necessary for older people to continue working even though their health should prevent it. And when they reach pensioner status, benefits may not allow reasonable living conditions; on the other hand earning extra as a retired person may reduce pension (for instance in Lithuania).

In conclusion, there are important formal barriers reported by best agers in the BSR region, but they are relatively few, and they may not constitute the most pressing aspects of discrimination in most countries. This observation aligns with the finding in the Swedish ESF project “Life Competence 50+”, where the activity dealing with discriminatory laws and regulations, at the end dealt mostly with other classes of barriers, such as those contained in the following paragraphs.⁷

Health related barriers

In the scientific literature on sustainable work, the concept of workability is a cornerstone.⁸ Operationalization of workability has helped (a) identifying decline in work ability at an early stage, (b) following the effects of preventive measures and early rehabilitation, and (c) assessing work disability. Large cohorts belonging to different occupational groups in

⁷ Holmer, J. et al. (2010)

⁸ Ilmarinen, J. Tuomi, K. (1992). Work ability of aging workers.

Finland have been monitored over long periods of time. It has been found that to a large extent, factors related to health are of high significance for maintaining workability. It was noted that the workability declined steadily in the age period 45–57 years, particularly so in jobs with physical demands, whereas in mentally demanding jobs, the workability remained almost unchanged. This indicates a difference between blue and white collar jobs, at least at a group level, when it comes to the chances to remain in the active workforce up to official retirement age. Physical demands and repetitive work in particular present risk factors. It was also emphasized in one of the parallel reports of the Best Agers project⁹ that based on Swedish data, blue collar jobs entail a higher risk compared to white collar jobs for leaving working life prematurely.

Also in the present study, signs pointing at a difference are found with respect to perceived health status between blue and white collar workers. For example, a high portion of the Polish subjects, who are predominantly blue collar, report health problems (mostly of musculoskeletal nature), whereas Swedish interviewees, who were predominantly white collar, report few such problems.

Health problems tend to be a major obstacle across the BSR, particularly as they may limit the productivity. A Lithuanian interviewee summarizes:

“Nobody wants persons who are not as productive as before.” (unemployed male bricklayer, age 60)

There are many reports that the restructuring and intensification of work increases the physical demands.

“The pressure has increased ... I can feel that we have been downsized. We have to run faster... it wears out your body” (Danish female health care worker, age 56)

“There is high pace of work and I am suffering from back pain and poor vision.” (Polish female accountant, age 55)

“The strategic work of private energy enterprises is more and more global and focused on selling technologies in foreign countries; as a consequence the workload is getting extremely intense and the demands are increasing as well. This makes it generally difficult for older employees to keep track.” (German male construction engineer, age 62)

⁹ Kadefors, R. (2011) Costs and Benefits of Best Agers Employment. Report, Best Agers project

The most frequent reasons reported that impair possibilities to continue working, are musculoskeletal complaints. This, for instance, is the case in the Danish health care workers. Inability to comply with physical demands is also in Latvia the most common health related problem mentioned.

In the Swedish best agers interviews, the health status in the subjects with white collar backgrounds was generally good, whereas several blue collars reported problems, for instance:

“They know I have shoulder problems and they don't want to hire me when I practise on jobs” (female unemployed seamstress, age 55)

Also several Polish interviewees, who had a blue collar background, voice physical problems as a main reason why they may have to give up working:

“I plan to retire as soon as it possible, on the other hand I am worried about my financial situation. I like working but I am not sure if I will make it due to health aspects... I am tired of physical work. If I could choose the type of work I think it might be easier work, in terms of duties and physical strength.” (Polish female warehouse employee, age 57)

The observations in the present study indicate that health concerns remain across all contributing countries a major barrier to continued work. This is particularly evident in blue collar workers. The workability problems experienced have generally a background in physical demands at work, but it seems that the problems experienced by many interviewees are aggravated by stress due to increased work pace. The Swedish Work Environment Agency in an interview study¹⁰ asked persons aged 50+, who said that they could not sustain working to legislated pension age, what work environment changes would be needed to change in order to make it possible for them continue working. The result was unequivocal: for all categories, men and women, blue and white collars, the stated priority was work pace. There may also be a relation to the varying possibilities to work part time; we shall come back to this issue below.

Economic factors

The economic conditions affecting the interest and motivation of best agers to continue working, are quite complex, and differs between BSR countries. Factors to be taken into account include:

- Official pension age
- Pension benefits; their level and how they are calculated

¹⁰ Arbetsmiljön 2001. AM 68 SM 0201

- Possibilities to earn extra as a retired person
- Special offers

Economic conditions may either enhance or curtail the motivation for employees to retire. In the push-pull model mentioned above, economic factors are seen to play an important role. The pension systems may be designed in such a way that it makes necessary at least for some groups to continue working, for economic reasons. This is the case in Poland, and also in Denmark, in Lithuania and in Sweden, particularly so for women, who may have worked part-time for many years. This may result in too low pension if they would decide to stop working early. Here the economic incentives for working up to legislated pension are strong. It may be that persons in this category continue working, although they would rather like to leave for family reasons, or perhaps due to health problems. A Lithuanian woman declares;

“As I have a family I want to stay at home as long as it is possible; part time is a dream, but the salary is not enough to survive.” (Lithuanian unemployed female electrician, age 55)

In Poland, some subjects indicate that they would continue working if there would be more economic benefits; this applies to the employed and the unemployed as well. For others, the economic situation is such that they need to continue working:

“Yes, I would like to work as much as possible, mostly because of contact with other people. I do not like to sit idly. Important is also the financial aspect of the work.” (Polish employed woman, cleaner, age 65)

“I think that nowadays it is really hard to live only having a pension. It is necessary to have an additional occupation.” (Polish unemployed woman, age 59)

There are similar worries about the economic prospects when retiring early, for instance in Lithuania:

“I would need an additional income source along with my pension, which will not be enough for me and my wife.” (unemployed male blue collar worker, age 57)

Some people see that they may do something else, but that they cannot afford it: What would be needed is, “Some sort of income or compensation for voluntary work.” (Swedish female unemployed horticulturist, age 55).

In conclusion, there are few perceived economic barriers that impede the possibilities to continue working. An exemption is where the earnings of retired persons working extra

results in reduced pension benefits (Lithuania). The major economic aspect affecting work patterns is rather where people cannot afford stopping to work, due to poor pension benefits. This is a reality in all countries and for large groups in the labour market.

Barriers relating to working hours

In the Swedish study cited above concerning the changes needed in order to facilitate working to official pension age, working hours was a second priority in men (blue and white collars) and in women (white collars). (The second priority in blue collar women was physical workload). This indicates that work hours at least in some groups could present important barriers.

An example of a barrier relating to working hours would be when a person likes to continue working, but for reasons of health or family cannot work full time, and part time work is denied by the employer. There are many examples of such cases in the present study.

There is a demand for higher flexibility, to be able to work shorter hours, and not having to work weekends and evenings, for instance in Denmark, among health care workers. No-one of the Danish respondents wishes to work more than 37 hours per week.

The aspect of reduced working hours is raised by several interviewees also in Lithuania. For instance:

“If management would ask, I would agree to work longer, but I would ask for part-time or freelancing.” (unemployed male engineer, age 58)

A German female financial controller (age 52) declares plainly that the most important incentive for her to continue working “would be the reduction of working time”.

Some subjects relate working hours to work demands:

“The more physically heavy the work is, the fewer hours I would like to work.”
(German male unemployed electrician, age 50)

He also articulates reservations with respect to shift work.

“I couldn't imagine 5 days of shift work; I am not used to that anymore, also because of my family”

Another German interviewee states,

"Working time is always an issue as well. Part-time jobs are perfect and would support the employment of elderly people, since not every person this age can to fulfil a 40 hours job." (female employed financial controller, age 52)

The individual needs were articulated also by a German employed male construction engineer, age 62:

"Both demands and motivation of employees is very high, but more flexible working-time offers have to be adopted to relate to the individual capacity and strengths and weaknesses; with more ambition in this field you could support the pleasure of working and the working time."

It can be concluded that to many interviewees in various countries, a higher degree of flexibility with respect to working hours would help in order to motivate them to continue working.

Competence related barriers

Lack of adequate competence may present difficult barriers to best agers, and prevent them from continuing working or re-entering work when having been made redundant.

In Latvia, a common view is that there is a lack of updated technical competence. Also among the unemployed Swedish best agers, it is very common that lack of updated competence presents a barrier.

"I've switched career path to work within care, and it's a barrier that I don't have a complete education."

"I don't know English, which is difficult today when so much is in English"

"My education is too old"

A common competence related barrier in Latvia is the inability of many Russian best agers to speak Latvian language; this adds to the general problem of acquiring a new job if you are an older person.

It is noted that lack of competence may not necessarily concern technical competences only. A Polish unemployed female, age 57, notes: "I've noticed a need for ability to work with other people, communication, flexibility, open-minded, manners."

This observation reflects the necessity to be able to adapt to new concepts of work organisation and management.

A German industrial manager, age 55, notes:

"65 as the official retirement age would be the end in this company"; "half-life of knowledge decreases intensively, so I'm not sure if it makes sense to work endlessly..."

Even though there are indications that lack of competence signifies a major barrier to many best agers, in the present material, this aspect is not as prominent as has been found in previous studies concerning employability.¹¹ The reason might be that other barriers, such as negative attitudes or deteriorating health, by many interviewees in the present context are perceived more difficult.

Family related barriers

Family related considerations presenting barriers to continued work may be positive or negative in nature. The positive aspect is when there is a desire to stop working in order to be able to spend more time with family. A German female employed salesperson, age 59, husband already retired, says that she would like to retire at 63:

"I still want to have some years, you never know what happens in the future, for instance health-related, or for how long you will live...my husband is already retired, I want to spend time with him. I don't want to retire and notice shortly afterwards that that was it."

And a Lithuanian female teacher, age 59:

"My decision depends on my husband's decision. We are of the same age and have to plan our future together."

Similarly, a German employed female controller, age 52, declares that she wishes to retire soon:

"Probably in my mid 50's – or: if I were able to reduce working time, I would work longer. My husband is retired already, so working longer would be a problem for my family situation. If he continued longer, I would do so as well"

Many interviewees articulate a desire to spend time with their families, and that this limits the willingness to continue working. A Lithuanian woman says that this happens when "the other family member is already retired and (we) may want to spend more time together, which is always missing."

¹¹ Kadefors, R. (2011) Employability of older people conclusions: a scientific review, conclusions and recommendations. Report, Best Agers project

However, there is also the negative family consideration aspect: that family members need to be taken care of. There are many such reports, in the present study from Denmark, Sweden, Germany, Lithuania. In particular, it concerns spouse or aged and diseased parents.

There may also be a barrier relating to the need to care for grandchildren:

“The attitude that the older persons should stay at home and look after grandsons, that's not fair, as I have professional ambitions.” (Lithuanian unemployed female architect, age 58)

Lack of access to day-care homes for preschool children does present a problem in some parts of the BSR.

It is noted that most interviewees who give family as a reason why they would or would not continue working, are women. Some males, however, declare that they are unwilling to move to another location in order to get a job:

“I cannot move for a job elsewhere, it's not possible to leave the family.” (Swedish unemployed male sailor, age 63)

This reluctance to move is not necessarily an age related phenomenon; it has been identified as one of the major obstacles in Swedish labour market policies.

Attitude related barriers

There is evidence from previous studies¹² that negative attitudes to older workers play a role and present difficult barriers to many persons belonging to the best agers group. Such negative attitudes may be found at the individual, workplace or societal level.

In the present interview material, the attitude aspect is by far the most commonly addressed one.

For instance, negative attitudes to older workers are mentioned by many interviewees in Latvia. There are views that older people do not have the right skills: “There is suspicion from stereotype that older ones are lagging behind” (unemployed ship mechanic, Latvia). And a Latvian agency director emphasises that it is needed to “stop blaming the age for lack of skills – computer and language skills have nothing to do with age”.

A negative attitude from employers to older workers is reported by several subjects.

“In my previous carrier I had high responsibility, but recently I had a negative experience; I was being recruited to the position, but suffered from (negative) age stereotype attitude”.

¹² Ibid.

“It is difficult to divert from high responsibility to something simple. Employers are biased about age, without appreciation of professional and life experience”.
(former executive director, Latvia).

But the same interviewee adds: “young people are not competent, they are lazy and uneducated”. This intergenerational distrust towards the younger workmates is met also in an interview with a Polish employee:

“I have noticed that younger employees are less motivated to work, mostly because of lack of experience, which is useful in all situations.” (female cleaner, age 65)

Also in Sweden, there is an intergenerational conflict that is voiced:

“There is a culture where they question why older people should remain at work and not let younger people in” (female administrator, employed)

Similar conflicts are met in Poland:

“There is also a quiet pressure to retire as soon as possible. This is something that employers and colleagues at work would like to see. From that point of view, when the pensions are still much more worse than normal salaries, older people try to work as much as possible, and are not willing to share their knowledge with younger people. It is some kind of competition between youths and older workers” (male unemployed engineer, age 63)

“It is sad to see like young people try to push the older workers from the labour market. There is a need of some changes in the company culture in Poland in general” (female unemployed job councillor, age 57)

“The competition is strong. Mostly occurs in the moments, in which younger people point out some mistakes to the older people. Older employees feel they are taking the places of work from the young.” (Polish employed female cleaner, age 65)

“Young people are trying to catch up with the older – nobody wants to get fired.” (Polish employed female accountant, age 55)

Even though the argument that older people should give up working in order to give room for the younger unemployed is flawed at the national level¹³, it can of course be relevant in a

¹³ OECD statistics (2010)

small workplace where there is a given number of jobs (for instance, in a school or in a hospital).

The perceived negative attitude problem focuses primarily on employers, and is a reality across the BSR.

“Employers and co-workers think I'm too old. I think I'm cheerful and healthy.”
(Swedish female academic job-seeking, age 62)

“I have seen many get fired because of their age.” (Swedish female administrator, age 59)

“They are more likely to hire younger people, mostly very attractive people. So older people might feel threatened.” (Polish hairdresser, unemployed, age 45)

“My company offers additional money benefits for those people who are willing to retire as soon as possible. It is a tool for employment reduction which unfortunately reduces also the quality of the performed work.” (Polish female employed organisational specialist, age 60)

A German male unemployed electrician, age 50, articulates the negative attitudes in employers:

“Employers want young, strong employees and elderly don't fit. Employers should find solutions and be more flexible, e.g. pay lower wages for elderly, but I have a lot of experience to share, although I am not that strong anymore.”

Another unemployed German (female salesperson, age 52) summarizes her experience:

“Employers have no confidence in 50+ people, although they are more reliable, more diligent, they know what real work is, not less healthy than young ones. Another aspect: modern way of preparing job applications is really challenging for elderly, I feel overstrained; the style changed completely: while you could visit the employer in person in former times, now you have to send a very formal written application. This leads to resignation after three denials – and because of age discrimination, you have no chance. They are only looking for young and dynamic people; applications should be read in another way, in favour of elderly employees.”

There is even mobbing experienced by best agers:

“Laughing and humiliation of older employees is commonplace” (Polish male farming engineer, age 63)

“At my former job, there was mobbing on behalf of the supervisors, because formally I couldn't be fired; with my colleagues it was rather making harmless jokes about age.” (German unemployed female salesperson, age 52)

There are also negative experiences of discrimination by employment agencies:

“Two employment agencies didn't engage me because of age discrimination when I was only in my mid-forties; in general employers want to have young employees with the experience of a senior worker; way of job application changed very much – temporary employment agencies are the relevant players, it is those who are hiring workers instead of the companies themselves, even the employment agency relies on their agency.” (German male unemployed cook, age 51)

“I wouldn't work for temporary employment agencies anymore and I wouldn't take any job, but accepting constraints is alright.” (German female unemployed salesperson, age 52)

There is overwhelming evidence in the present study that negative attitudes on behalf of the employers do present a major problem to many best agers, in all parts of the Baltic States Region. It is logical that a majority of such negative testimonies come from the unemployed. Nevertheless, the picture is mixed; there are also many positive experiences.

“I rate my company as a very good employer. Each person determines himself – the retirement age, holidays... (of course in accordance with the law). There is no pressure from the employer to work longer.” (Polish male employed transport specialist, age 60)

A male German manager, age 55, believes that health aspects in his company are not at the disadvantage of the older employees:

“In my workplace, age doesn't play a role. If you ask our personal department, I sometimes think they do age-based selection – but I don't know the statistics about sick leave. In my department, I have the impression that the capacity of elderly employees is higher because of their experience, and sick leave lower...”

There might be a difference in the recognition of the competence of older employees between small and medium size enterprises on the one hand, and larger enterprises on the other hand:

“I am a friend of the owner and general manager; we share the same desk; good mutual trust.” (German male purchaser, age 61; ten employees)

But workplaces are different. For instance in the reports from Lithuania, Germany and Poland, there are also several positive observations:

“My colleagues respect me because of my experience and knowledge.” (Lithuanian unemployed male manager, age 54)

“The generation differences are not dramatic, it also depends on the elder person’s position” (Lithuanian unemployed male civil engineer, age 60)

“Co-workers are friendly if you are friendly too.” (Lithuanian unemployed male technician, age 55)

“In my previous job the younger and the older workers were helping each other. I think that employers are seeking for people with special skills, not thinking about the age of the person to be hired.” (Polish unemployed woman, age 59)

“I am the oldest employee and my colleagues always say that I have a calming influence in our workplace; and they can ask a lot due to my knowledge and know-how.” (German employed male salesperson, age 64)

“I have the possibility to share my knowledge with others.” (Lithuanian unemployed male manager, age 54)

“Work has high meaning, because one can move something in society, can – theoretically – transfer knowledge and experiences to younger colleagues.” (German employed female construction engineer, age 60)

“Older employees are respected at the workplace for their competence and willingness to share the knowledge.” (Lithuanian employed male teacher, age 61)

It is interesting to note that among the employed Swedish interviewees, who worked in various capacities in the schools, only few wished to continue to age 65 or 67 (which is the maximum age to which you have a right to remain in permanent employment). There were persons who felt tired, but also quite a few who just wished to do something else:

“I want to do something before I die”

”Now, I want to do something else”

"There are so many things you can do while you're still healthy"

"Want to be healthy and active when I retire."

For these Swedish people, economic aspects seem to be of little importance. On the other hand, they value work highly, identifying "socializing and the satisfaction of doing something of importance" as key reasons why they are working.

Among the unemployed Swedish best agers there was a common ambition to continue working to age 65. They also value work highly; a typical comment:

"It's everything, you have friends there" (female, previously self-employed, age 61)

Similar views were also articulated in Poland and in Germany.

"I wish to stay as long as it is possible on the labour market. Work is EVERYTHING for me!" (female, unemployed, age 63)

"I think that despite of everything (barriers...) it is really important for me to work as long as possible. I assume that I wouldn't know what to do with free time. Of course, working makes me live at a good level – better standard of living." (Polish employed female cleaner, age 65)

I would work as long as possible, if physically possible; "I have to work! I am a workaholic – if I am sitting at home I get crazy." (German female unemployed salesperson, age 50)

"It structures the day; I have to work physically in a way to release my energy – one way of doing something, not sitting in front of the computer all day." (German male unemployed cook, age 51)

A German civil engineer (age 62) who had retired and then returned to work, explains how he looks at the value of work:

"Especially one significance: communication with colleagues, getting in touch and involved with new challenges; social contacts. I'm a team-player and I made the experience that especially the lack of social contacts was very tough. When I first retired, I wasn't prepared for that at that point in time... My wife was working, my colleagues were working and I wasn't allowed to work so being alone was a huge challenge!"

It is clear that to many interviewees across the BSR, work is an essential ingredient in life, in the employed and in the unemployed group as well. And the inability for many of them not to be able to continue working although they wish to do so stands out as a problem of identity.

Views on retirement

There are interviewees who, when asked about when they would wish to retire, declare: “at the latest time possible, it will depend on health!” (Lithuanian male business owner, age 58). But this is not the general view.

In Latvia, several of the persons interviewed have a background in academia or other intellectual trades. They tend to find solutions for continued work (paid or unpaid).

Life planning may affect how best agers look at retirement.

“If health is robust, I’d like to work until 65 and it should be no problem in this company. On the contrary – I was already asked if I could work longer, because in my age you have a good share of experience and good customer connections”... “I don’t see the point why the state should deserve earning from me through working longer. I paid for my pension and so I want to receive it completely” (German employed male purchaser, age 61)

Here the decision lies with the individual person, and what he wants to do with his “third age”.

A German industry manager (male, age 55) says that he desires to retire at 62:

“You have to prepare for retirement; due to the amount of working time I have almost no private life, so I couldn’t imagine retiring right now. Plus – I really like working, I have good colleagues and I am happy coming to work on Mondays. And I would really have to find something similar in my private life.”

“Work has very high meaning – it is earning money, you have a social status, you can move something, live out creativity, lead people – which is fascinating as well – things, I don’t have in normal life”; “if I turn up somewhere, I am the Mr. XY from company XY and not only XY the pensioner”; “but if you see it from the opposite side: as a pensioner you are free and you don’t “sell your soul”.

A Lithuanian unemployed financial manager, age 62, when asked at what age she would like to retire:

“70. I cannot imagine myself sitting at home looking after grandchildren”... “I can share the knowledge and experience to younger generation till then.”

And a Lithuanian female sales manager, age 60, plainly declares that she plans to continue working, since “I still have energy to outperform younger people and still need some secure finance for the future.”

A Swedish unemployed interviewee summarizes his experience: “Politicians have been talking about sex discrimination. I think the term ‘age discrimination’ should be established, so that that doesn’t occur.” The Swedish government was in fact very late in making the European Directive prohibiting e.g., age discrimination, part of Swedish law (2009), and this regulation is not widely known as of yet in the workplaces.

What needs to be changed?

In Denmark, the focus among the respondents with respect to what is needed to be changed in order to make possible for them to continue working is on organisational matters: reduced work pace, flexible and more individualized working hours. And a general recommendation to authorities: “the good employees have experience which should be used”.

Many interviewees feel that employers should do much more to ensure flexibility and take into account the capacities of the older employee:

“Shorter working hours, to facilitate the load – if people complain about health, this should in no way be disregarded, because after so many years of work that would be irrelevant. If a person wants it, he or she must be allowed to take the deserved rest.” (Lithuanian employed male technician, age 55)

Mentoring is mentioned by a German employed female foreign trade agent (age 59) as something that needs to be improved:

“It is important to better integrate elderly employees and their knowledge and experiences; especially young colleagues enter the company and think they know ‘what’s happening’ –without having professional experience.”

There is a need to take into account much better the contributions that older people can make to the company:

“Many companies neglect the know-how of elderly employees (‘knowledge keepers’); most of the young trainees/employees lack the practical and professional knowledge. But: when talking to our customers we often hear, that companies reconvene to hire especially elderly employees because of these features and their integrity and because they have problems without them.” (German employed male salesperson, age 64)

Companies may need better incentives:

“Maybe government initiatives, so as to give some finance resources to the companies keeping and hiring skilled older persons.” (Lithuanian unemployed female technician, age 59)

Even if company management does not care, colleagues at work may take competence transfer seriously:

“On behalf of the executive; elderly workers are "on the storage track"; with regard to colleagues, especially young colleagues, sharing of experience and knowledge is highly demanded and positively requested.” (German employed female construction engineer, age 60)

Table 2, contributed by Larsen and Svendsen (2011)¹⁴ shows the results from a Danish questionnaire study comprising municipality employees. Here the most commonly mentioned precaution making possible continuing working was “less strain from work”, followed by improved working conditions, and reduced or more flexible working hours.

Wishes for improvements	Chosen	Not chosen	Total	
	%	%	n	%
Less strain from work*	38,1	61,9	176	100
More flexible workings hours*	21,0	79,0	176	100
Making better use of own competences*	13,1	86,9	176	100
Lower workings hours without compensation*	22,7	77,3	176	100
Improved working environment (physical and mental)*	28,4	71,6	176	100
Development of competences (courses and in-service training)*	15,9	84,1	176	100
Other*	31,3	68,7	176	100

It is concluded in the Danish study:

“As for the employees in the survey and interviews, family related aspects seem important to take into consideration when considering whether to leave the labour market or not. However, the most important reason according to the survey is the workload. With respect to this, the employees referred to the work as being very intensive. If one compares this with the high quality norms which the Best Agers according to this case study possess, cf. “setting the bar higher”, it implies that the employees in a very significant degree are exposed to a mental pressure. Besides, given that there are becoming fewer and fewer to service each of the citizens and that there is not enough time to sufficient contact with the citizen or resident, these are apparent explanations on why each of the employees are hard-pressed.

¹⁴ Larsen, N. Svendsen, V.L. (2011) *Best Agers in Denmark*

One other particular aspect is a wish to work less in the weekends compared to the currently situation where such work takes place every other weekend. In addition, there is a wish to have more influence on the arrangement of the working hours.”

The desire to work flexible hours or part-time was articulated as follows by an employed German male purchaser, age 61:

“If I'm 65, I wouldn't want to work 10–11 hours, I could imagine to care only about specific customer relations or do holiday replacement. I could imagine working 2–3 days a week, maybe from Tuesday to Thursday, because I don't want to feel bound too much then.”

Another white collar worker (German male manager, age 55) has similar thoughts:

“Age 65,7 would be my official retirement age, but I could leave 2–3 years earlier; it also depends on my health and my wife's health... I wouldn't want to work until the official age – or there will be intelligent solutions one day, such as working only 3 days a week. But as a head of department only half-time... I don't know whether this is possible.”

More flexibility and options for the individual are aspects of importance:

“The decision should be independent of employers' incentives; point in time fits well to family-situation, so other incentives were not important.” (German employed female administrator, age 61)

Among the employed Swedish best agers, there is concern about workload and lack of competence. One of them summarizes the needs:

“Less work load and more time to learn new technology”

Taking into account the many reports of health related barriers, it is not surprising that some additional precautions are asked for. A Lithuanian woman (age 56), who report health problems, suggests that healthcare programmes be introduced for older people in the company.

And a German employed female finance controller (age 52) emphasizes the need for, “competence development, especially regarding rapid development of IT; this combined life experience in the job is worth one's weight in gold and I think that employers are aware of this.”
“It is a question of financial state-support for employment of elderly workers, e.g. by paying for their competence development or introduction in new jobs”

A German female public administrator, age 61, summarizes the needs:

“Removal of working load and frequency is important, while at the same time respectful treatment is necessary; more free time without the consequence of more density in working periods; mentoring, where experiences can be transferred.”

Your attitude to retirement is an individual issue, how you experience the push and pull factors in terms of work commitment, economy, family related incentives, work ability in relation to work demands.

6. Comment

6.1 Generic observations

There are several aspects in the evaluation of barriers to continued employment that seem to be generic – that is, comprised by many best agers across the BSR – rather than coloured by the national conditions. Such aspects relate to the general fields of health problems, to inadequate competence and to negative attitudes.

The health aspects highlighted deal almost entirely with reduced work ability in relation to work demands: problems with physical loading and high work pace are mentioned as barriers by many interviewees. These are problems that may in most cases be a result of physical and mental ageing processes that affect all human beings, whereas work demands remain the same irrespective of age.

In the investigation of work ability and age, the so-called Work Ability Index (WAI) has been developed and applied in particular by Finnish researchers in longitudinal studies of the labour market. For instance, they pursued WAI monitoring of municipal employees (N=6257) over 12 years, and watched the development of work ability in this cohort.¹⁵ They found that whereas WAI declined significantly among 30% of the participants, it remained unchanged in about 60%, and that it increased in 10% of the population group. In other words, ageing doesn't necessarily mean deterioration of work ability with age. At higher age, best agers should be seen as individuals, not necessarily as members of an age group. As one Swedish female unemployed administrator, age 59, puts it in the present study: "I think they should look more at the individual and her mental age."

Factors found to influence positive as well as negative development included management, ergonomics, and lifestyle. The following specific aspects enhancing retained work ability were identified:

- decrease in repetitive movements,

¹⁵ Ilmarinen, J. (2009)

- increased satisfaction with supervisors' attitudes,
- increase in vigorous physical exercise in leisure time.

Based on the WAI and other Finnish studies, an intervention program, FinnAge, was devised. Four different actions were prioritised: physical work environment, psycho-social work environment, health and lifestyle promotion, and updating professional skills.¹⁶ In the present investigation, we have found that factors related to health, competence, and attitudes have been highlighted by interviewees. They correspond well to factors identified in the cited Finnish studies.

There is statistical evidence, and also indications in the present interview study, that physical loading at work constitutes a major problem for many best agers, and that musculoskeletal disorders is one of the most important health factors preventing continued work. Table 3 shows the exposure to risk factors in the work environment in the BSR (European Agency for Safety and Health at Work 2010).

	Repetitive hand or arm movements	Carrying or moving heavy loads	Prolonged standing or walking	Painful or tiring positions	Vibrations
Denmark	61,2	29,8	73,5	35,5	16,8
Estonia	65,4	39,7	72,8	50,9	33,6
Finland	79,6	38,5	79,4	45,2	21,6
Germany	56,9	31,8	73,5	46,4	28,8
Latvia	59,1	41,4	74,1	48,5	31,7
Lithuania	69,3	41,9	80,4	47,2	31,8
Poland	58,1	40,8	73,1	51,0	31,2
Sweden	64,2	36,7	77,6	43,6	15,1

According to Table 3, exposure to the risk factor "Repetitive hand or arm movements" is highest in Finland and lowest in Poland; the difference is more than 20%. With respect to the risk factors "Carrying or moving heavy loads", and "Painful or tiring positions", Denmark has much lower exposures than other BSR countries, whereas the Baltic states and Poland have comparatively high percentages. A similar picture is seen also with respect to exposure to vibration. This general observation is elucidated further in Figure 1, showing the percentage of workers reporting back ache, and muscular neck and shoulder pain, respectively. It is seen that among the BSR countries, Poland and the Baltic states have the highest percentages with

¹⁶ Ilmarinen, J. Rantanen, J. (1999)

¹⁷ Data from European Rik Observatory Report (2010). European Agency for Safety and Health at Work.

respect to back pain, which may be related to exposures to “Carrying or moving heavy loads”, and “Painful or tiring positions”.

With respect to shoulder and neck pain, Finland has by far the highest numbers. It can be hypothesised that this may be related to the reported high occurrence of “Repetitive hand or arm movements”. This type of health related problems and occupational exposures may present challenges in all BSR countries. Reduction of this type of exposures is likely to improve the possibilities for best agers to remain active in working life, however, the focus may be different in different countries.

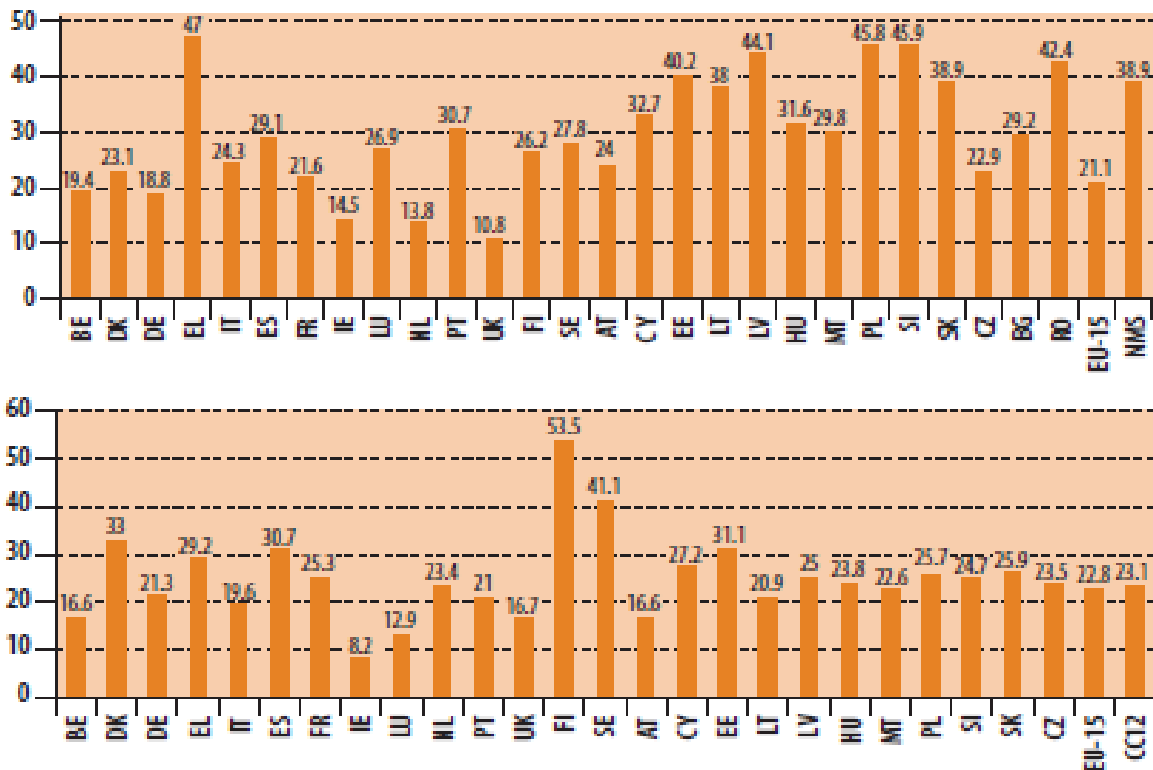


Figure 1. Percentages of workers in EU25 countries who report that they suffer from back ache (top) or muscular pain in the shoulder or neck (bottom). European Agency for Safety and Health at Work (2010)

Figure 2 shows in the EU25 countries, the participation in life-long learning for men and women (2004).¹⁸ It was found in an OECD analysis on training and employment performance¹⁹ that policies aiming at enhancing workers’ skills showed a positive link between upgrading skills and overall labour force participation. This applied particularly to women and to workers aged 45–55 years. It is seen in the figure that in the Nordic countries, the percentage of employees participating in competence development is higher than in other parts of the BSR. Such activities may be a powerful tool in order to enhance the

¹⁸ Eurostat, Structural indicators

¹⁹ OECD Employment Outlook 2004

employability of older workers, and may in part explain the high work participation numbers in the Nordic countries.

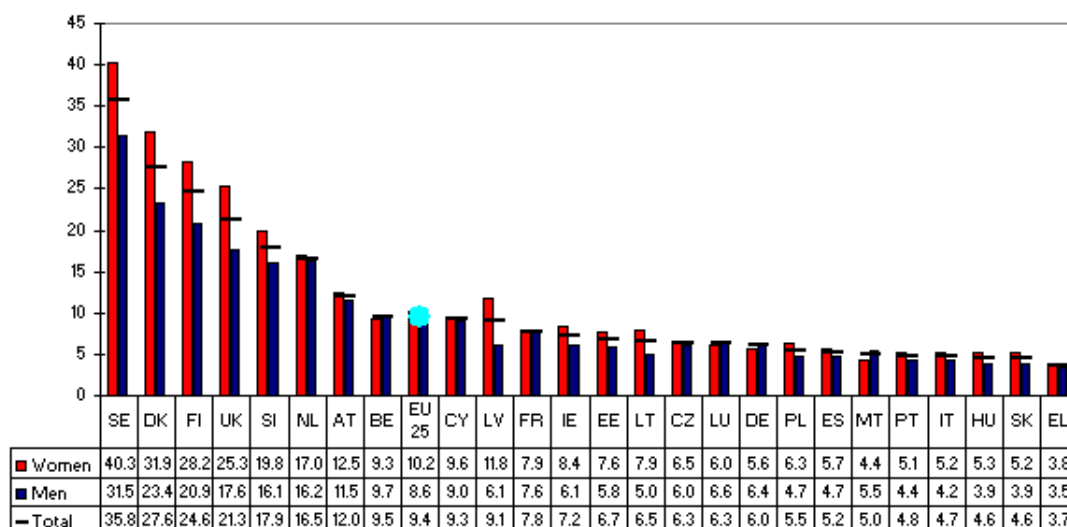


Figure 2. Percentage of the population aged 25–64 participating in education and training over the four weeks prior to the survey. EU25, Eurostat (2005)

The third generic factor is the negative attitudes met by best agers throughout the BSR, particularly by the unemployed who endeavour to return to work after having been made redundant. Such negative attitudes are encountered in particular among employers and supervisors. They tend to see best agers not as individual persons, but as members of a group of oldies without updated competence and who are characterised as non-adaptive, unfit and unwilling to learn new things. It is clear that changing attitudes among employers remains a major priority across the BSR,

6.2 National observations

Denmark

It is possible that the labour market in Denmark is being more affected by downsizing and restructuring than other parts of the BSR; this applies also in the public sector, in the present case articulated in hospital care:

“There have been cut-backs in spending and consequently downsizing in personnel. This implies, that the remaining personnel have to work extra hard. In addition, around holidays and periods of sickness, the workload gets extra demanding. The use of substitutes have been cut down some places and the employees mentioned that it is extra burden full to work with non-regular substitutes.”²⁰

There is also dissatisfaction with how the organizations are being managed:

“A theme which repeated itself amongst the commentaries was that demands, control, registration and administration take up too much of time in the eldercare, which leads to less time to direct contact with the citizens. It was commentaries as: “It will soon become impossible to carry out a decent and humane job because of rules and documentation”, “The more or less meaningless documentation”, and “There simply is no such thing as common sense”.

These observations indicate that there may be barriers that are produced by introduction of new organisational paradigms, probably not confined to the public sector but also to other parts of the Danish labour market.

It is of note that even though physical work related exposures in Denmark, according to EU statistics (Table 3) tend to be low compared to other BSR countries, health related complaints are rather common (Table 1). This observation may be related to the notion made above, with respect to the stressful work situation reported by Danish interviewees.

Germany

There is an interesting observation made by one of the German interviewees:

“The Northern European countries have different structures in employment; wife is from Denmark/daughter lives and works in Denmark; “many of the positive structures there would be transferrable to Germany” (male wholesale clerk, employed, age 64)

However, it is not made specific in what way that the German companies may learn.

“In my department working is very flexible, home office is possible, absolutely no problems concerning age; but companies as such should definitely confess

²⁰ Larsen and Svendsen (2011)

to their elderly workforce. This is what I'm really angry about – the industry is crying for skilled labour force, and there are countless elderly workers who are perfectly skilled. There is kind of a "youth obsession"; I think a good age-mix is the best (German male industrial manager, age 55)

An aspect where in fact Germany could learn from the Nordic countries, and which may prove valuable in order to improve employability, is the access not only to labour market training for the unemployed, which is a requirement for receiving unemployment benefits, but to competence development and lifelong learning for large groups of employed workers. Provisions to achieve continued part time work do exist in some areas of the German labour market: one of the interviewees (female employee in public administration, age 61) declares that due to partial retirement-measures, she already accepts lower wages in favour of earlier retirement (so called "Block-Modell: you accept 70% of your former wages for 5 years and you retire 2-3 years earlier while getting paid continuously a reduced wage). She summarizes her experience:

“As a member of the personal board, I always tried to solicit for the partial retirement model with a reduction of working time while working until the official pension age, but I know a lot of employees want to retire earlier; my own energy and motivation would have been enough for 3 more years, but it fitted well.”

Taking into account the widespread concern articulated in the present study concerning access to part-time work, the Block-Modell may be an option to be considered in other parts of the BSR for stepwise exit from the labour market.

Latvia

The past history of Latvia colours the present study results in several ways. It is evident that the language problem (Russians not being fluent in Latvian) presents a major obstacle to unemployed best agers with a Russian background. It appears that some of these people even tend to think that they had better opportunities in the Soviet days.

“More jobs are needed, older people are less popular in general, because they are ill more often, have less modern skills, Soviet factory system was more secure compared to nowadays.” (female Russian kiosk attendant, with little knowledge of Latvian language)

Some people also mention the current disrespect in society to rules and regulations:

“A main barrier is the grey economy where employers are not paying all social insurance taxes.” (female hairdresser, unemployed)

Access to lifelong learning is rather low in Latvia, with a remarkable difference between men and women, at the disadvantage of the latter (Figure 1). In a parallel Best Agers report, it is emphasised that the recent economic recession had tough consequences for the labour market, and that competence development might be an adequate way to address the problem, also in the group of retired people who may wish to continue working:

“The recent deep economic recession in Latvia affected men more than women in terms of employment. High unemployment has been a consequence not just of the contraction of economy in general, but particularly the male-dominated construction and manufacturing industries. In order to help Best Agers in Latvia to have good jobs after retirement, specific training should be provided to enable them to do suitable jobs, particularly computer skills, English language skills and communication skills.”²¹

Many Latvian interviewees reflect about their economic situation and about economic incentives.

Lithuania

In Lithuania, many interviewees complain about the economic conditions for retired people who wish to continue working. There is little economic incentive to do so, and at the same time there are indications that pension benefits are too low and that earning extra is almost a necessity to some:

“The law concerning the working pensioners is not well organised, it needs to be amended.” (female unemployed accountant, age 58)

“Strange law according to which the taxes are high if you work in the retirement time.” (unemployed male bricklayer, age 60)

“The conditions to work for retired people are not very favourable these days,” (employed female nurse, age 58)

“The pensions are not sufficient at the moment, so additional government attention should be paid to involve retired persons to remain active as long as they can.”

“Your pension is reduced by the amount you get if you continue working,” (male teacher, age 61)

²¹ Employment situation of best agers in Latvia. WP3 Report (2011)

It is common that interviewees wish to work part time, but that they cannot afford doing so.

Poland

Statistics show that work participation in the best agers group is low compared to most countries in the BSR. Economic factors seem important to many interviewees, who declare that it would only be better economic benefits that could motivate them to continue working. On the other hand, there are also many Polish interviewees who have a generally positive view about work and who would like to carry on working; in this group, economic incentives may not be as important. A Polish unemployed female vocational councillor, age 57, declares:

“Working means a lot to me. It gives me possibilities to improve my skills, new opportunities, self-fulfilment, contacts with other people, challenge, tasks to enforce decisions and actions”.

There are many reports in the present interview study about health problems that could be attributed to occupational exposures, particularly in the unemployed. According to the statistics concerning exposure to occupational risk factors (Figure 5), Poland has high numbers, compared to most BSR countries. The prevalence of back pain is also high.

Sweden

There are rules in Sweden that present economic barriers to the unemployed. If you are on unemployment, you cannot have or start your own company. And you may lose your subsidy if you test a new job, and it doesn't work out.

“It's a sort of barrier to be under unemployment subsidy” (male, unemployed, age 62)

A concern with respect to ageing and work that is mentioned in the Swedish interviews is the problem of competence transfer in a generation shift. It seems that this is an area where Sweden is not well developed:

“The employer should look at the generational change taking place. Have an idea that when an employee is about to retire, a successor is appointed a year before and teaches up to in order to take advantage of the experience and knowledge available so that young are not just thrown into a post. See also a risk that many functions are removed for financial reasons when they retire. Believe in mentoring.” (female school administrator, employed)

The problem of competence loss when key people leave seems as difficult to handle in all organizations, irrespective of size.²² It was found in a parallel Best Agers study²³ that in Denmark, Finland, Sweden and Germany, there was awareness of this problem in the SMEs, and different approaches made to alleviate it, whereas in other parts of the BSR this was not yet so, probably since managers of private businesses are younger there.

7. On methodology and significance

The present investigation is not a statistical evaluation of attitudes to work in the Baltic Sea Region. Applying qualitative methodology, it is rather an exploratory study of how best agers in the six participating countries experience their situation, and in particular, what barriers they have met while endeavouring to continue working, or return to work after having been made redundant.

Even though the total number of interviews is fairly large, in each country the set of interviews comprise a biased sample. No effort has been made to randomise the samples, only to incorporate subjects so as to allow stratifications with respect to country, men/women, employed/unemployed.

As emphasised above in the methods paragraph, the approach chosen does not allow statistical evaluation of significances, or analysis of generalizability, but the articulations made do mirror the experiences of many individual persons. This may allow us to see every best ager not only as a member of a socioeconomic group, but as an individual person with his or her relation to age and work.

²² Holmer et al. (2010)

²³ Kadefors (2011)

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APPENDIX 1



Work Package 3, activity 2.3 – Employment situation of Best Agers
Interview Guide – Employees and unemployed

Guide for application of interview guide WP3 Activity 2 (step 3)

The interview guide is intended to explore the barriers that Best Agers meet when they wish to remain in or re-enter working life. It is to be expected that these barriers are different in different countries, depending on formal and informal conditions. It can be hypothesised that they differ also between males and females, and between blue and white collar workers.

Evaluation of interviews takes some effort; therefore you should not be overambitious with respect to number of respondents. It is better to have good data from few interviews than bad data from many.

A suggested procedure for application of the interview guide is as follows.

1. Translate the interview guide into your own language (if needed).
2. Identify target groups. They should include (as a minimum) four best agers respondents in each cell:

	Male	Female
White collar, working	4	4
White collar, not working	4	4
Blue collar, working	4	4
Blue collar, not working	4	4

The respondents should be drawn from organisations or activities that may be considered typical for working life in your country/region.

3. Find persons who can carry out the interviews. Students can be very useful, but they need a good introduction. Preferably one or two interviewers at most.
4. Interviews should be taped, but need not necessarily to be transcribed. Good quotes should be found in as many categories as possible. The categories are defined in an Excel data book that is supplied. Please use only a code to identify the individual.
5. The quotes are translated into English and supplied together with the background information for every subject into the Excel data sheet. Please note that the Excel book has two sheets! And that there is one book for the employed and another one for the

unemployed.

6. The spread sheets are mailed to University of Gothenburg. OBS! No identification by name of respondents must be included (otherwise we need to consult our local ethical committee, and that must be avoided due to the time and efforts involved for application).
7. The results will be compiled by University of Gothenburg and reported as stated in the project plan.

You may use the free space in the interview guide for notes in your own language, and use it when you enter data in the Excel data sheets.

Interview Guide – Employees
1. Personal Data

1.1. Age:years		
1.2. Sex:	<input type="radio"/> male	<input type="radio"/> female	
1.3. Civil Status:	<input type="radio"/> single	<input type="radio"/> married/living with partner	
1.4 Where do you live?	<input type="radio"/> city	<input type="radio"/> town	<input type="radio"/> rural

2. Status description

2.1. Professional training/education:		
2.2. Occupation:		
2.3. Employed for how long:		
2.4. Where do you work (public/private; branch):	
2.5. What specific kind of work do you do?		
2.6. Employment status:	<input type="radio"/> Full time <input type="radio"/> Part time <input type="radio"/> Partial retirement <input type="radio"/> Temporal <input type="radio"/> Other:.....	
2.7.a. How many people are employed at your workplace/company?	Workplace:.....	Company:.....
2.7.b. What is the average age at your workplace/company?	Workplace:.....	Company:.....
2.7.c. At what age do workmates usually retire?	Workplace:.....	Company:.....
2.8. How is your <u>health status</u> ? → mental → physical → other Number of days off work last 12 months due to health problems?		

3. Scenarios

3.1. At what age would you <u>like to retire</u> ? Why?	
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3.2 When do you think that you will <u>actually retire</u> ? Why?	
3.3. What do you estimate that your workmates would like with respect to their <u>designated and their actual retirement age</u> ?	<input type="radio"/> the majority wish to retire <u>before</u> official retirement age <input type="radio"/> the majority wish to retire <u>according to the</u> official retirement age <input type="radio"/> the majority wish to retire <u>after</u> official retirement age
3.4. Does the <u>work you do agree with your desired kind of work</u> ? If you could choose, what kind of work would you like to do? Why?	
3.5. Does your actual <u>working time agree with your desired working time</u> ? If you could choose, how much would you like to work (full time/part time)? Why?	
3.6. If you could choose – would you prefer to <u>work longer or to retire as soon as possible</u> ?	
3.7. What <u>does work mean to you personally</u> ?	
3.8. Would you work longer, if there were <u>more/better incentives/offers</u> by your employer? Which ones would that be?	

4. Barriers hampering continued employment

Have you experienced <u>barriers which hampered continued employment</u> ?	
4.1. <u>Formal barriers</u> (laws, regulations)? Which ones?	

4.2. <u>Health related barriers</u> (high number of work hours, high work pace, high physical or mental workload)? Which ones?	
4.3. <u>Economic barriers</u> ? Which ones?	
4.4. <u>Barriers relating to working hours</u> (e.g. shift work, irregular working hours, lack of part time work or partial retirement plans)? Which ones?	
4.5. <u>Competence related barriers</u> (is your professional knowledge and know-how in demand?) Which ones?	
4.6. <u>Family related barriers</u> (e.g. care of family members, already retired spouse)?	
4.7. How would you assess your <u>company/organisation's culture</u> with respect to older employees? How would you describe the attitude towards older employees <ul style="list-style-type: none"> • among supervisors • among workmates? 	
4.8. Have you experienced competition or conflict between age groups at your workplace? Please specify.	

5. Reflections. Potential solutions

<p>5.1. What <u>changes</u> would be of prime importance in order to facilitate <u>continued employment</u> for you? Reasons!</p>	
<p>5.2. Do you have any further comments, additional information or reflections?</p>	

Interview Guide – Unemployed
1. Personal Data

1.1. Age:years		
1.2. Sex:	<input type="radio"/> male	<input type="radio"/> female	
1.3. Civil Status:	<input type="radio"/> single	<input type="radio"/> married/living with partner	
1.4 Where do you live?	<input type="radio"/> city	<input type="radio"/> town	<input type="radio"/> rural

2. Status description

2.1. <u>Professional training/education</u> :	
2.2. Unemployed for how long:	
2.3. What was your <u>most recent employment</u> (public/private; branch) and for how long?
2.4. Are you participating in <u>labour market training</u> or similar activities?	
2.5. How is your <u>health status</u> ? → mental → physical → other Sick listings last 12 months?	

3. Scenarios

3.1. At what age would you <u>like to retire</u> ? Why?	
3.2 When do you think that you will <u>actually retire</u> ? Why?	
3.3. If you could choose, <u>what kind of work would you like to do</u> ? Why?	
3.4. <u>How much would you like to work</u> (full time, part time)? Why?	
3.5. If you could choose – would you prefer to <u>work longer or to retire as soon as possible</u> ?	

3.6 <u>What does work mean to you personally?</u>	
3.7. Would you work longer, if there were <u>more/better incentives offered?</u> Which ones would that be?	

4. *Barriers hampering continued employment*

Have you experienced <u>barriers which hampered continued employment?</u>	
4.1. <u>Formal barriers</u> (laws, regulations)? Which ones?	
4.2. <u>Health related barriers</u> (high number of work hours, high work pace, high physical or mental workload)? Which ones?	
4.3. <u>Economic barriers?</u> Which ones?	
4.4. <u>Barriers relating to working hours</u> (e.g. shift work, irregular working hours, lack of part time work or partial retirement plans)? Which ones?	
4.5. <u>Competence related barriers</u> (is your professional knowledge and know-how in demand?) Which ones?	
4.6. <u>Family related barriers</u> (e.g. care of family members, already retired spouse)?	

4.7. How would you assess <u>the attitude</u> with respect to older employees <ul style="list-style-type: none"> • among employers • among supervisors • among workmates? 	
4.8. Any other barriers?	

5. Reflections. Potential solutions

5.1. What <u>changes</u> would be of prime importance in order to facilitate <u>continued employment</u> for you? Reasons?	
5.2. Do you have any further comments, additional information or reflections?	