

Chapter 1

Introduction – promoting age-friendly work and learning policies

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1.1. Changing mindsets about age and learning

Up to now, political discussions about Europe's ageing population have mainly focused on the urgent pension and retirement age reforms that need to be put in place. However, the fact that Europe is now facing a crisis in relation to these reforms reflects the lack of comprehensive and multi-dimensional policies with regard to aging at work. Political discourse has tended to be dominated by passive and deterministic thinking about ageing and working life. This book is arguing that foreseeing policies are required not only with regard to pensions but also in relation to social, working-life, work-life balance and lifelong learning issues. A radical change towards more holistic and active perspectives on how people can manage and negotiate their working life is required. For a start, changes are needed in the way people think about their lifespan so that they envisage having active, fulfilling and productive lives throughout all of their different life stages. Each stage in one's life offers risks and opportunities that are shaped by two interrelated factors – one's socio-cultural and political environment on the one hand and one's individual choices, actions and limitations on the other. Life is a social and personal journey that can take many twists and turns. While one's chronological age is an important factor, on its own it is not an inhibiting and deterministic one.

However, many people in their 50s today experience their chronological age as a determining factor. Some feel discriminated against because they cannot remain working when they reach a certain age, or they have been let go by their employers as they are considered too old at 50. On the other hand, other people feel that recent retirement reforms are forcing them to work for a longer period that they had bargained for when they started their working life. Yet again there are others who would wish to work part-time or in a flexible manner but find that labour market or organisational practices do not allow them to do so. And still there are others who tend to give up on an active life when they reach a certain age as they feel, or have picked up the labour market signals, that they are too old to learn to deal with social and economic changes. In particular many are inhibited by an overemphasis of information and communication technologies (ICT) skills to the neglect of more general work place skills, attitudes and experience. This book discusses how the above problems may be addressed in a proactive manner.

The central argument of the book is that society, work organisations and individuals must think of the ageing process as a lifelong developmental and learning process in which one can

continuously learn to take on new life challenges taking one's interests, opportunities and constraints into account. This means adopting a lifelong learning mindset, understanding learning as a broad, holistic concept encompassing individual education and training, but equally and perhaps more importantly also collective community and workplace learning. The adoption of 'age-friendly' working and lifelong learning practices is required in the interest of economic and social sustainability and personal well-being for all.

According to traditional views, as one grows older one is less able to learn and adapt and is less productive at work. For these reasons, in the recent past, many companies, often supported by government policies, were glad to adopt early retirement practices in order to cut labour costs and/or take on younger people. (Regarding the definition of the complex term 'older worker' see Box 1.) In many cases, older people felt that they had no option but to accept early retirement, as their contribution was no longer valued by their firms. On the other hand for many others the incentive of a good retirement package was too good to refuse.

An aspect of the complexity of the theme of 'older workers and lifelong learning' is defining the target group: how old is 'older'? In an international perspective the terminology can also be confusing in that not all languages have an equivalent to the English terminology used in this context (e.g. 'elderly'). In the European discussion, particularly in the Nordic countries, an age limit of 45 years has often been used. Statisticians also tend to take the age of 45 as the demarcation between being a younger (24-44 years) or an older worker (45-64 years) - see Descy in this book. This suggests that one becomes 'older' at a 'younger' age nowadays, and it seems that the term 'older' has overtaken what used to be defined as 'middle-aged' (Tikkanen, 1998).

Box 1. Definition of the term 'older worker'

The research literature shows that employers discourage the recruitment of older workers because they are not seen to be flexible enough for modern working life. Studies in the end of the 1990s showed that, soon after reaching 40 years of age, many employees were no longer wanted by employers, in particular in recruitment situations (Walker, 1997a; Nordic Council of Ministers, 2004). In the 1990s the unemployment rate among older workers rose above that of younger workers and was of longer duration.

Trade unions also faced a dilemma concerning older workers. On the one hand they recognised that older workers were being discriminated against, as illustrated by redundancy schemes, but on the other hand they were happy to negotiate attractive early retirement packages (Walker, 1997a).

It is clear that there are stereotypes concerning older workers in relation to their so called 'lower trainability', lack of flexibility and poor cost-effectiveness compared to younger workers, which are often used as arguments for not investing money in their training and development (van Vianen, 1997). Yet, results from studies on age and skill obsolescence are inconsistent, suggesting either a positive, neutral or negative relationship between age and

performance (see Sterns et al., 1994 and Paloniemi in this book). In fact, there is an ambiguity in employers' attitudes towards older workers. On one hand while older workers' skills and knowledge are regarded as obsolete, they are also viewed as loyal and reliable – even more so than younger workers (Walker, 1997b).

In his review of the history of retirement in Britain, Stanley Parker concluded that older workers – especially working class older people – have always been treated as a reserve of labour. He draws our attention to a historical study by Stearns (1997) who stated that 'between 1890-1919, older workers were being threatened by the obsolescence of their skills and by work speed-up. British metal workers claimed that the latter caused premature ageing, and found that many of their employers judged them "too old at forty"' (Parker, 1987, p. 79). By the end of the 1990s, things did not seem to have changed very much! Research on older workers at that time underlined their marginal position in working life and did not show any improvements in their opportunities for learning and development (Tikkanen, 1998).

1.2. Signs of change

However, Alan Walker, arguably the most notable social scientist working in the area of ageing and employment in the 1990s, concluded his EU study on 'The European project on combating age barriers in job recruitment and training' on a more optimistic note. He stated that despite the discouraging findings from the nine countries participating in the study, the many examples of good practice reported cannot be taken as isolated cases, but are an indication that "change is underway" (Walker, 1997a, p. 40).

Indeed in the last few years which have been marked by an increased visibility of the older workers' issue in public discussion, policy making and some areas of research, there are signs that the changes forecast by Walker are occurring at least to some extent. There has been a steady, albeit slowly growing interest in learning and education for older workers. The reasons behind this trend are many, drawing as much on developments taking place in the 'world of learning' as in the 'world of work' (for an overview on this, see Tikkanen, 1998).

On the organisational level one sees a welcome change towards an interest in older workers as illustrated by the use of terms such as 'age management' or 'age aware management' and 'aging appropriate work design' (see Dworschak in this volume). Thus, it is not just a question of older workers adapting to the new situation of staying longer at work, but labour legislation and workplace practices must also adapt to promote 'work place wellbeing' and age friendly work practices for older people. This means that instead of treating older people as passive recipients of top-down policy changes, their needs should be taken in account. Furthermore their 'experience' should be valued and made use of. Henry Ford, the founder of the US automobile magnate, said that 'if you take all of the experience and judgement of men (sic) over 50 out of the world, there won't be enough left to run it' !

Some countries seem to be making progress. Studies by the OECD (2006) and others (Reday-Mulvey, 2005; Walker, 1997a) show that the countries proactively addressing the issue of ageing and making notable investments tend to be in Northern Europe. Finland started early

(Ilmarinen, 1999) soon followed by Sweden and Denmark. More recently the Netherlands and Norway are taking actions. Note should also be taken of actions in Germany, the UK and Japan (OECD, 2006; Reday-Mulvey, 2005; Walker 1997a). Recent political initiatives have been inspired by the concept of ‘lifelong learning’. The European Union has given a major impetus to this rich and holistic concept of learning (European Commission, 2000; 2001; 2003; Council of the European Union, 2002) that challenges traditional perspectives about the potential learning capacities of people including older people.

In summary, the argumentation behind the above initiatives is that if we are to tackle the different problems affecting older people outlined in the first page, then their distinctive resources and strengths must be recognised and their needs must be addressed by means of support and development structures. This can result in major benefits for everybody in society in the form of intergenerational learning where both young and older people learn from each other.

1.3 The purpose of this book

Although some research has been carried out in the field of older workers and lifelong learning in Europe and beyond, it is rather scattered and in some countries hardly exists. This book addresses this by providing an overview of discussions at the crossroads of two topics – older workers and lifelong learning – that up to now have been the subject of separate discourses. The distinctive feature of this book is that it addresses the issue of older workers from a lifelong learning perspective. This is novel as traditionally studies on older workers and ageing in general have been strongly influenced by a medical view, defining ageing in terms of (physical) decline and health problems.

It has been timely to bring together international researchers in a small network under the auspices of the EU Agency Cedefop to produce this book. However, from the start it must be stated that researchers with this particular focus are still rather limited. Thus, not all of the authors in this book are specialists in the theme of older workers. Rather, their expertise lies in closely related areas, such as for example – workplace learning, employment issues, or organisational changes or national learning interventions. This book, therefore, has a rather general introductory purpose, assembling a variety of contributions. In this regard readers can dip in and out of this book reading the chapters that interest them. For this reason, as well as providing a short reflection on the different contributions to the book in the next chapter by Tikkanen, abstracts are also provided at the beginning of each individual chapter.

The main focus of this book is on European approaches and experiences. However, with contributions from scholars in other continents, Australia, Japan and the US, the reader can reflect on the European perspective in a broader international context. Besides providing a basis for an interesting comparison, this broader perspective helps to identify the distinctive nature of ‘European’ research and discussions – but also, of course, the many similarities with ‘Australian’, ‘Japanese’ and ‘American’ trends.

1.4 Contents of the book in brief

This book has six sections. The first section has two chapters that provide an overview of the current state of play in research and policy discourses about older workers and lifelong learning. As already stated, the first chapter in this section also provides a short commentary on each of the chapters in the later sections of the book.

Section two provides an analysis of the statistical data on demographic trends with regard to the ageing of the workforce and participation in learning in Europe and beyond. The second chapter in this section provides a detailed overview of the state of play in Japan.

Sections three and four present the views of older workers on their workplaces and their learning. The first chapter looks at how workers perceive the meaning of age and experience with regard to work-competence. This section also has a chapter on the views of older US public servants about the influence ‘workplace value-satisfaction’ had on their retirement plans. The third chapter looks at the problems faced by older male workers. The next section (section four), comprises two personal reflections by older workers who present the challenges they faced in trying to get the most out of their work and learning opportunities.

Section five presents theoretical and critical perspectives. The first chapter examines the role learning and development can play in the life-history process of continually reconstituting one’s identity. The second chapter proposes that older workers need to become more active and critically engaged in their workplaces if they are to enhance their learning. The third chapter casts a critical glance at national funding policies for older workers’ learning in the Netherlands.

The final section six comprises four chapters that look at the impact of workplace organisational practices on older workers ability to adapt and learn. All of these chapters, which give an account of experiences in Germany, the UK and The Netherlands, highlight the need to align work organisation and learning approaches with the requirements of older workers.

1.5 Concluding comment

This book sets out to contribute to discussions on the societal transformations required to address the issues of ageing and learning. However, discussions on their own are not enough. The authors of this book believe that the time has now come for action and policy changes at societal, organisational levels and of course also at the individual attitudinal and initiative level. As has been pointed out by the European Commission and the OECD, this calls for collaboration between governments, employers, trade unions and civil society in promoting ‘age-friendly’ work and learning policies. However, there is no blueprint for the way forward as each society, community and organisation must find its own pathway based on a dialogue with all of its stakeholders - but in particular listening to the views of the older workers themselves.

1.6 Bibliography

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