CEDEFOP

Promoting lifelong learning for older workers

An international overview

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Executive summary

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 have been strongly influenced by a medical view, defining ageing in terms of physical and mental decline. This book challenges traditional mind-sets about older workers and learning. The central argument is that society, work organisations and individuals must think of ageing as a lifelong learning and developmental process in which one continuously takes on new life challenges, in line with one's interests, opportunities and limitations. In the context of work, this means understanding learning as a broad, holistic concept encompassing individual education and training, but equally, and perhaps more importantly, also entailing participative collective workplace learning that is actively supported by employers.

This book has a general introductory purpose as research on this theme has only begun to emerge. Although some research has been carried out on older workers and lifelong learning in Europe and beyond, it is rather scattered and, in several countries, hardly exists. The purpose of this book is to address this gap by providing an overview of discussions at the crossroads of the two topics – older workers and lifelong learning –that, so far, have been the subject of separate discourses.

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 European perspective can be reviewed in a broader international context.

Contributors to this book emphasise and discuss issues related to the following points:

(a) as the emerging knowledge society is increasingly becoming a 'greying society', there is a need to change attitudes towards ageing and its effects;

(b) for lifelong learning to become a reality for older workers, ordinary workplaces must become primary places of learning. This raises important issues about employers' roles in promoting lifelong learning;

(c) workplaces must be designed in such a way that it is possible for people to 'grow older' at work. Organisational solutions play a critical role in

older workers' willingness to continue working. Employers, together with trade unions, can play a central role in fostering continuous learning and promoting 'age-friendly workplaces' that promote learning;

(d) a strong learning culture in the workplace makes employees more receptive to change, regardless of age;

(e) older workers tend to relate their competence to personal or individual characteristics and work-related issues rather than purely to age.

Regarding the central messages emerging from this book, policy changes related to the following three points are seen as crucial:

(a) adapting new attitudes to ageing and learning in working life and society;

(b) building inclusive and learning supportive workplaces for people as they grow older;

(c) creating partnerships between all stakeholders in society to address the demographic learning challenge.

With regard to the last point, the need for coordinated social and economic policies and actions to promote 'active ageing' has been emphasised by the European Commission, OECD and ILO. This calls for cooperation between public bodies, employers, trade unions and civil society to address the agenda of 'age-friendly' employment and educational policies. However, there is no blueprint for the way forward. Each community and organisation must find its own pathway based on a dialogue with all stakeholders, listening, in particular, to the views of the older workers themselves.

Preface

The issue of Europe's ageing workforce is receiving attention in news headlines across Europe, largely because of controversial proposals on increased pension contributions and a later retirement age. All Member States of the European Union (EU) are currently involved in difficult decision-making about the best way to deal with the fact that, while birth-rates are dropping substantially, people are living a great deal longer. This means fewer people active in work to support those in retirement. Radical changes on pension contributions and retirement age are needed now to avoid a future financial catastrophe. Thus, it is in the interest of long-term economic and social sustainability that the EU, in the context of the Lisbon agenda, is pushing ahead with these measures to renew the basis of its competitiveness.

However, financial measures on their own are not enough. Socioeconomic measures promoting new employment policies that value the contribution of older workers, offer a more satisfactory work-life balance and provide opportunities for lifelong learning throughout one's different life phases, are also needed. In relation to the Lisbon agenda, it is also argued that the EU must strengthen social cohesion as a pillar of sustainable socioeconomic development. The economic and the social are not to be juxtaposed; instead, synergy should exist between economic, employment and educational policies.

In addressing the issue of an ageing European workforce, socioeconomic innovation measures are called for that promote: employment for people over their life-course; better quality in working life; more flexibility in workplaces to suit employees as well as employers; and supportive learning environments. These measures entail 'age management' interventions which take into account that people's capacities and needs change as they move through their different life phases. Central to these interventions are lifelong learning strategies focusing on all aspects of a person's working life: updating in new occupational skills, training, but also coaching and guidance on how to make smooth life and work transitions.

Cedefop, which operates at the cross-roads of employment and education and training policies, promotes research to identify strategies that address economic and social goals in a balanced way. More specifically, it is

concerned with promoting lifelong learning policies that enable people of all ages to have more active, productive and fulfilled working lives.

This book, which links Cedefop's interest in lifelong learning with older workers (¹), draws on the rich work of researchers from Europe and beyond. It argues for active and multidimensional policies that combine workplace reform policies with targeted training and learning policies. In recognising that older people receive significantly less training than other age groups, it examines ways in which work and learning policies can combine to promote greater participation of older people in work and learning. In particular it calls for a critical re-evaluation of employers' attitudes to recruiting/retaining older workers in employment and their lifelong learning. This book recounts the experiences of too many older workers who feel that their experience and general competence is not valued by employers and labour-market specialists. This not only has a negative impact on those involved but is also detrimental to economic performance and indeed to intergenerational learning at societal level.

The book also stresses that the demographic challenge affects everybody in society as everyone eventually grows old, so age-management and lifelong learning and training measures that anticipate people's needs in the different phases of their lives need to be put in place in all workplaces. This calls for cooperation between all of the actors in society – governments, employers, trade unions, training providers and researchers – working closely together to address urgently the issue of an ageing Europe.

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(¹) It is difficult to define who exactly is an older worker. For a note on this, see Box 1 in Chapter 1 of this volume.

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CHAPTER 1

Introduction: promoting age-friendly work and learning policies

Tarja Tikkanen and Barry Nyhan

1.1. Changing mindsets about age and learning

Up to now, political discussions about Europe's ageing population have mainly focused on the urgent need for pension and retirement age reforms. However, the fact that Europe is now facing a crisis in relation to these reforms reflects the lack of comprehensive and multi-dimensional policies on ageing at work. Political discourse has tended to be dominated by passive and deterministic thinking about ageing and working life. This book argues that forward-looking policies are needed not only for 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 needed. 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 sociocultural 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 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 or even 40 or younger in some cases. In contrast, recent retirement reforms seem to be forcing some to work for a longer period than they had bargained for when they started their working life. 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 on information and communication technologies skills to the neglect of more general workplace skills, attitudes and experience. This book discusses how the above problems may be addressed in a proactive manner.

The central argument of this 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 wellbeing for all.

Box 1. **Definition of the term 'older worker'**

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 be confusing. According to the EU Lisbon benchmark the priority group of older workers is those between 55 and 64 years of age. However, statisticians 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 Chapter 4). In the Nordic countries an age limit of 45 years tends to be used. 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). *De facto* the definition of an older worker is not so much a question of terminology or statistics but rather a work organisation's practice in viewing and labelling certain workers as older workers.

According to traditional views, as one grows older one is less able to learn and adapt (2) and is less productive at work. For these reasons, in the recent past, many companies, often supported by government policies, were glad to

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(2) Recent neurophysiological research does not support this view.

adopt early retirement practices to cut labour costs and/or take on younger people (concerning the definition of the complex term 'older worker' see Box 1). Often, older people felt that they had no option but to accept early retirement, as their contribution was no longer valued by their firms. At the same time, for many others the incentive of a good retirement package was too good to refuse.

Research shows that many employers discourage the recruitment of older workers because they are not seen to be flexible enough for modern working life. Studies at 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, unemployment among older workers rose above that of younger workers and was of longer duration.

Trade unions also faced a dilemma with 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 about older workers and their perceived lower trainability, lack of flexibility and poor cost-effectiveness when compared to younger workers; these 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 (Sterns et al., 1994; Paloniemi in Chapter 6). In fact, there is an ambiguity in employers' attitudes towards older workers. 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 (1977, quoted in Parker, 1987, p. 79) 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"'. By the end of the 1990s, things did not seem to have changed 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

Alan Walker, arguably the most notable social scientist working in 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).

The last few years have been marked by an increased visibility of the older workers' issue in public discussion, policy-making and some areas of research, with 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).

At organisational level there is 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 ageing appropriate work design (Dworschak et al., in Chapter 14). It is not just a question of older workers adapting to the new situation of staying longer at work; labour legislation and workplace practices must also adapt to promote 'workplace 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 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). From an economic point of view, labour-market practitioners and work organisations in some countries have become aware of the 'human capital' of older workers, seeing that the experience and

competence of people at an older age is more important than their formal qualifications acquired decades ago.

Recent political initiatives have been inspired by the concept of 'lifelong learning'. The EU has given a major impetus to this rich and holistic concept of learning (EC, 2000; 2001; 2003; Council of the EU, 2002) that challenges traditional perspectives about the potential learning capacities of people, including older people.

Behind the above initiatives is the belief 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 across society in the form of intergenerational learning, where young and older people learn from each other.

1.3. Purpose of this book

Although some research has been carried out on older workers and lifelong learning in Europe and beyond, it is rather scattered and, in some countries, hardly exists. This book provides 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 workplace learning, employment issues, 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 as well as the many similarities with Australian, Japanese and American trends.

1.4. Contents in brief

This book has six parts. Part I has two chapters that provide an overview of the current state of play in research and policy discourses about older workers and lifelong learning. Chapter 2 (Section 2.5) also provides a short commentary on each of the chapters.

Part II provides an analysis of the statistical data on demographic trends on the ageing of the workforce and participation in learning in Europe and beyond. Chapter 5 provides a detailed overview of the state of play in Japan.

Parts III and IV present the views of older workers on their workplaces and their learning. Chapter 6 looks at how workers perceive the meaning of age and experience with regard to work competence. Part III also has a chapter on the views of older US public servants about the influence 'workplace value-satisfaction' had on their retirement plans. Chapter 8 looks at the problems faced by older male workers. Part IV 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.

Part V presents theoretical and critical perspectives. Chapter 11 examines the role learning and development can play in the life-history process of continually reconstituting one's identity. Chapter 12 proposes that older workers need to become more active and critically engaged in their workplaces if they are to enhance their learning. Chapter 13 casts a critical glance at national funding policies for older workers' learning in the Netherlands.

Finally, Part VI 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 and organisational levels and also at individual attitudinal and initiative levels. As has been pointed out by the European Commission, OECD and ILO, this calls for cooperation 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. Each society, community and organisation must find its own pathway based on a dialogue with all of its stakeholders, in particular listening to the views of the older workers themselves.

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PART I

Older workers and lifelong learning: current state of play

CHAPTER 2
The lifelong learning debate and older workers

Tarja Tikkanen

Abstract

This chapter reviews the main research and policy discussions on older workers and lifelong learning and discusses the key messages of the different international contributors to this book. The review raises several issues. First, it shows that the theme of older workers and lifelong learning is complex and multilayered. This has to do with the new mind-set about older workers and lifelong learning, radically different from the traditional one, demanded of society as a whole, of older workers themselves, employers, labour unions, policy-makers and training providers. Second, instead of finding a coherent unitary discourse on the learning of older workers, two separate parallel discourses exist: one on older workers and the other on lifelong learning. Third, the challenge is to bring these together, to provide an integrated framework for research, policy and practice. A step in this direction can be seen in recent efforts to bring together the two discourses of vocational education and training and human resource development in Europe. Fourth, the challenge to society and organisations posed by older workers calls for more holistic strategies that are very different from the current state of affairs in which research, policy and practice on this theme are fragmented. Finally, as evidenced by the summary and review of the different contributions to this book outlined in this chapter, there is a considerable variation in how the challenge of older workers and lifelong learning is being tackled in different countries in Europe and beyond.

2.1. Aim of this chapter

This chapter reviews the wider research background against which the rest of the chapters in this volume can be located. This is a sizeable task as there is a great deal of literature on the topics of older workers on the one hand and lifelong learning on the other: the limited space here is sufficient only to touch on some of the main issues ([3]). Also, integrating two traditionally separate areas of older workers and lifelong learning is a sizeable exercise in itself. However, the chapter will show that these discourses can share a common ground and that lifelong learning can, and should, become an integral part of research, policy and practice regarding older workers.

To set the scene for the remaining chapters in this book, Section 2.2 illustrates the complexity and challenge of bringing the two topics of older workers and lifelong learning together, while Sections 2.3 and 2.4 give a brief overview of the separate discussions and developments taking place in these two fields. Section 2.5 provides an overview of the contributions of the different authors in this book while Section 2.6 concludes the chapter by singling out three key issues that need to be addressed to promote lifelong learning for older workers.

2.2. Older workers and lifelong learning

'Older workers' is not a new topic for research and policy, nor is 'lifelong learning'. What is new in recent discussions is bringing these two together and attempting to integrate them into one discourse. However, the degree of novelty in this varies considerably between different European countries. Some countries have initiated broad-based national programmes and projects on older workers with all relevant parties involved; others are only starting to realise the importance of the issue and for others the theme is still not a priority. The main differences in Europe tend to be found on the north-south axis. Currently we know little about what is happening in eastern European countries.

The integration of the two themes is not an easy task because of long-established mind-sets about older workers and their learning. Sustainable solutions require the simultaneous consideration of different issues regarding

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[3] For interested readers a more comprehensive account of the issues can be found in *Learning and education of older workers: lifelong learning at the margin* (Tikkanen, 1998).

education and training, working life, social policy and workplace health and wellbeing (Tikkanen, 2005; see also Nyhan in Chapter 3). Recent major studies on older workers (e.g. Buck and Dworschak, 2003a; ILO, 2003; OECD, 2006; Reday-Mulvey, 2005) have underlined the need for a broad holistic approach.

The challenge lies in seeing learning and competence development as truly 'lifelong' both in practice and as policy in organisations and society at large. But perhaps most important is to develop cooperation across administrative divides and areas of responsibility in policy and practice. All stakeholders have much to gain from an integrated approach. For example, the recent OECD (2006) report challenges employers to think again about the disputed investment value of training older workers. The report shows that, because of the high turn-over of young employees, the average time a 50 year old can be expected to remain in a particular job is longer than that of a 20 year old. In the Nordic countries, in particular, the traditional tripartite cooperation, with government, business and labour coming together to work toward a common goal, provides an excellent framework for developing integrated approaches. Against this background it is perhaps not surprising that these countries have been forerunners in initiating national, cross-administrative programmes to address the challenge of an ageing workforce in a comprehensive manner. Examples are the Finnish National Programme for Ageing Workers (1997-2001) – reportedly 'the most integrated and comprehensive policy programme on older workers' in the EU (ILO, 2003, p. 10) – and the Norwegian National Initiative for Senior Workers (2001-05).

A further complexity regarding the theme of older workers and lifelong learning from a conceptual and policy perspective arises from the need to address it at three levels: individual, organisation and society. Table 1 illustrates this complexity.

Table 1 shows that, until recently, we have had two largely separate discourses, one on lifelong learning and the other on older workers. It outlines some of the major topics that have gained attention in public discussion. The most relevant themes under lifelong learning dealt with here are continuing vocational training, workplace learning and human resource development, while those under the theme of older workers cover four basic dimensions known as the four Cs: capacities, competence, conditions and compensation.

So far there is relatively little available knowledge on the crossroads of these two fields. Existing studies and discussions on older workers and lifelong learning have not adequately addressed these issues together on

Table 1. **The complexity of the theme 'older workers and lifelong learning'**

Levels of discussion	Lifelong learning [1]	Older workers
Individual	Humanistic values and goals Empowerment Self-fulfilment Life-management/coping skills Participation in learning and training Skills and qualifications	Job competence (knowledge, skills, attitudes) Employability Careers Health
Organisational	Work performance (economic values and goals) Human resource development Workplace learning	Flexibility Skill transfer Mentoring Organisational learning and memory Collective/collaborative competence Productivity Workplace wellbeing (work-life balance) Retirement and early exit
Society	Equal opportunities Access to learning and education Educational guidance and counselling Vocational education and training Exclusion Citizenship Learning society	Workforce diversity Labour markets Productivity Ageism Marginalisation Exclusion/inclusion Unemployment/employment Dependency rates Demographic development Pension schemes

[1] n the 1990s, and until the beginning of the new millennium, this area was referred to as adult learning and education.

any of the three levels outlined in Table 1. In part, this results from their different disciplinary backgrounds. Research on older workers has been based on sociology and social policy, and, to a degree, on health sciences and medicine. Research on learning and education in adulthood draws on adult education and developmental psychology and in the case of human

resource development and work-related learning, organisational sciences and economics. This disciplinary split means that no overall conceptual framework or model exists. The disciplinary divide between adult learning and education (including vocational training [vocational education and training and continuing vocational training]) and human resource development (Tikkanen, 2005) also further complicates the matter. It has been pointed out that regardless of the calls for multidisciplinary research, progress so far has not been satisfactory. Partly it is academia itself, with its structures, policies and traditions, that contributes to a fragmented picture of 'reality' and forms a major obstacle to developing more transparency and open communication across disciplines (Tikkanen, 2005). However, it must be acknowledged that some efforts have been made in research on older workers to include learning and competence perspectives in a broad framework. Examples are the 'work-ability model' (Ilmarinen, 1999) and the 'productive ageing' approach (Karazman et al., 2003).

2.3. Older workers

2.3.1. Societal level – problems and bottlenecks

The focus on older workers has been mainly at the macro socioeconomic level. The discourse has viewed older workers as being on the margins of the labour force, with their inclusion in the labour market being dependent on the general economic situation (Parker, 1987). What is most important to note is that this discourse has mainly concerned older workers in non-managerial positions and has rarely touched on the value of older workers' contribution in qualitative terms. As recently as the late 1990s, the European approach to the demographic change was described by the Council of Europe (1998) as 'the demography of exclusion'.

However, a European knowledge-base on older workers has been developed in covering issues such as early exit and retirement pathways (von Nordheim, 2003), unemployment, age discrimination in working life and the marginalisation of older workers. A landmark in this regard was the study *Combating age barriers in employment* (Walker, 1997a) carried out under the auspices of the European Foundation for the Improvement of Living and Working Conditions (Eurofound). This work showed the bottlenecks and problems in policies and regulations concerning exit pathways for older workers. It challenged existing thinking about older workers in working life, and called for a change in attitude and practice among employers and

governments. In addition, the agenda for the EU's Observatory of Ageing and Older People included other themes, such as living standards, health care and social integration (Walker, 1997a). An overview of various other European initiatives and activities addressing the ageing of the workforce is provided by Buck and Dworschak (2003b). Invariably, the major reports and policy documents on the ageing workforce during the last decade have concluded by recommending more training and learning for older workers.

2.3.2. **Organisational level: workplace policies and practice**

Research on practical measures for older workers have been least developed at organisational level. This is unfortunate, since it is workplace realities that in the end determine the conditions for the use and development of older workers' skills. Generally speaking, the cause of the slow progress here can be traced to organisational management practices. A current call for more attention to older workers lies at this level (e.g. Buck and Dworschak, 2003a). While information on innovative workplace practices is in great demand (von Nordheim, 2003) there has not been much progress on how to implement age-aware human resource policies (Buck and Dworschak, 2003b).

Much attention has been paid in the rich literature on work organisation to the implementation of change in workplaces, yet research on the involvement and participation of older employees in this change is almost totally lacking (Tikkanen, 1998). It has also been pointed out that various changes that have taken place in work (e.g. increasing flexi-work arrangements) should be favourable to older workers and their employment (OECD, 2006), but this is not always the case. The alarming results of the European survey on working conditions (Paoli, 1997; Paoli and Merllié, 2001) show that working conditions deteriorated for all age groups between 1990 and 2000 and learning opportunities have been in decline regardless of a range of legislative provisions across Europe which provide for minimum standards in different areas. Furthermore, work intensification has increased, making work more stressful and demanding (Broughton, 2001). Older workers are likely to experience greater physiological strain than younger people (see Chapter 14 by Dworschak et al.).

When ageing has been addressed at an organisational level, the voice of employers and management has been dominant. The approach to older workers in Finland – reportedly the first country to draft guidelines on improving the status of older workers (Rix, 2005) – started with the sole concern for rehabilitation and health. This was broadened later on to include

individual factors (e.g. skills and competence) and various work-related and organisational issues, more recently also underlining the crucial role of management to intervene more broadly (see also Linkola, 2003). Age-management ([4]) or what is also called age-aware management (Walker, 1999) became a topic in several countries (e.g. Ilmarinen, 1999, 2003; Rhebergen and Wognum, 1996; Tikkanen et al., 1996; Walker, 1997a, 1999), marking a positive interest in the situation of older workers in the workplace. Eurofound's work on barriers to and opportunities for age management in companies highlights good practice in relation to such issues as recruitment, training and development, flexible working, health and ergonomics (Eurofound, 2006).

However, it has also been suggested that instead of focusing on age-specific measures, human resource management should take diversity as a starting point (see Köhling, 2003, on the 'mixture of competency adequate measures'). Examples of this line of thinking are the 'diversity management' strategy (Karazman et al., 2003) and the approach of the top employers' forum on age (EFA network in the UK) which claims to be 'the first ever employer-led initiative to promote the benefits of a mixed-age workforce and to pledge to make age discrimination in the workplace a thing of the past' ([5]).

OECD surveys have shown that employers hold rather stereotypical views about the strengths and weaknesses of older workers. For example, 50 % of employers participating in the 2001 survey in Sweden considered older workers to have less relevant skills than younger workers and to be more rigid and inflexible with respect to the workplace. Similar findings exist for other countries in Europe and the US (OECD, 2006). Two-thirds of US workers aged 45-74 reported discrimination in 2002 (OECD, 2006). The negative attitudes of employers also have the effect of countering progressive trends in society and demotivate individuals who wish to adopt new attitudes to work.

([4]) 'The policy on age management aims at respecting and putting forward practical knowledge and experience in organisations and working environments. Coaching management is good age management.' Pauli Juuti, Director R&D, FEMDI (Finnish Employers' Management Development Institute).
'Age management means that members of various ages are taken into account in the working team. People of different ages have different needs, qualifications and skills. The work shall be organized so that the strengths and weaknesses of workers of different ages are paid attention to.' Jorma Rantanen, Professor, Institute of Occupational Health. Available from Internet: http://pre20031103.stm.fi/english/current/ageprog/whatisit.htm [cited 23.6.2006].

([5]) Available from Internet: www.efa.org.uk [cited 23.6.2006].

2.3.3. **Individual level: a focus on health and work ability**

With the exception of health-orientation, there are few studies on older workers at individual level. Studies on functional abilities have focused on how to keep older workers capable for, and motivated to, work longer. Much of this research in Europe and abroad has been based on the work ability index (WAI) developed by the Finnish Institute of Occupational Health (e.g. Ilmarinen et al., 1997). The Eurofound report *Quality of work and employment in Europe* (Eurofound, 2002) pointed out that, when it comes to ageing and work, two aspects affect health: an imbalance between working conditions and physical capacities which deteriorate with age; and the premature wear and tear of the body as a result of the kind of work undertaken.

When talking about older workers, although health is very important, it must be incorporated with other factors into a broader framework. Thus the broader notion of 'workplace wellbeing' has emerged in medically-oriented discussions about occupational health. It is argued that no other issue in modern society is as important to overall 'wellbeing' as working life (von Otter, 2003). Efforts to invest in learning and developmental activities are seriously undermined if people are experiencing problems in other areas of their work (Tikkanen, 2005).

2.4. Lifelong learning

2.4.1. **An all-encompassing and elusive concept**

The concept of lifelong learning – from the cradle to the grave – is all-encompassing and, at the same time, elusive. On a meta-level, an understanding of the concept is generally shared but when it comes to research, policy and practice the picture becomes somewhat blurred. There are two main perspectives to lifelong learning, one approaching it as an individual activity throughout one's life-course in different life-spheres, and the other one as an aspect of educational policy (Tikkanen, 2003). In policy discussions, lifelong learning draws on collective utilitarian reasoning, focusing on economic wellbeing, social stability and cohesion (Chisholm, 2004; ILO, 2000). On an individual level, using humanistic reasoning, the focus tends to be on holistic wellbeing which relates to the pursuit of human pleasure and happiness resulting from meaningful, 'optimal experiences' of learning and mastery (Csikszentmihalyi, 1990).

The concept of lifelong learning seems to be merging with, and even conceptually replacing, a broad area of activity which in the 1990s was called

'adult learning and education' (as distinct from childhood and youth education). However, a great divide remains between liberal and work-related domains. Here, the focus is on work-related learning and the benefits and challenges it brings to older workers.

Working life became a focus for studies in adult learning only after the emergence of research in human resource development. Parallel to this, theories and systems of continuing vocational training were developed. Considering the obvious overlap between these two fields, human resource development (covering all learning in the context of work) and continuing vocational training (focusing on formal learning), it is unfortunate that these fields are still largely separate (Tikkanen, 2005). The emergence of lifelong learning, however, seems to have aroused an interest in devising integrated frameworks; this is a development supported by Cedefop, the EU's reference centre for vocational education and training (Manning, 2006). However, in terms of a specific research and practice, older workers are still largely invisible, as they were in adult education and learning [6]. The challenge is how to address the learning needs of older workers, arguably the last group to be considered in discussions about lifelong learning (Tikkanen, 1998). The following section briefly takes up the issue of work-related lifelong learning.

2.4.2. **Work-related lifelong learning**

Rapid changes in working life make workplace experience a prerequisite for maintaining job competence and employability when informal and non-formal learning have gained value, complementing formal and institutional learning. A study on older unemployed technicians (Tikkanen, 1997) showed that, to maintain their job competence, this group felt that they needed to get back to work, even for short periods, regardless of what they had learnt from recent formal training courses. For most of today's older workers, workplace learning has comprised their vocational learning. Success stories in bringing lifelong learning to older workers relate to what is happening in ordinary workplaces.

However, major issues relating to older workers need to be addressed in research on workplace learning and human resources development and human resource management. The European Commission's report on quality indicators of lifelong learning (2002) outlines four challenges that are particularly relevant:

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[6] A reason for this is that adult education has largely captured the attention of those in 'early' adulthood, often young adults in their 20s who are already well educated.

(a) the skills, competences and attitudes challenge;
(b) the resource challenge: greater financial and time investment;
(c) the challenge of social inclusion: promoting opportunities for all;
(d) the challenge of social change: innovation in education and employment
     policies.

The following overview keeps these challenges in mind when reviewing different aspects of research on work-related learning.

2.4.2.1. *Human resource development perspective*

Older workers have been distant from the research, policy and practice of lifelong learning because of traditional ways of identifying their concerns in the workplace (e.g. health, safety, work environment, retirement). The results from the European study Worktow, *Working life changes and training of older workers* (Tikkanen et al., 2002) showed that management does not consider it their job – often not even appropriate – to propose more learning for older workers. Older workers may also find it difficult to ask for learning in an environment which favours learning for younger workers (Billett and van Woerkom, Chapter 12).

Participation in training is often viewed as dependent on individual interest and motivation which, in principle, are not related to age. However, age is seen as an important inhibiting factor by older workers because of how they interpret company training policies. They require special encouragement and support from management to participate in training; without this, little can be expected to happen. With encouragement older workers may be able to adopt more proactive or agentic attitudes to learning as outlined by Billett and van Woerkom (Chapter 12).

However, with the increase in knowledge-work forcing more attention on the human factor in workplaces, a new human resource management and human resource development concept of 'age-management' has come into play regarding older workers (Section 2.3.2 above). This is related to the development of a senior policy or a 'life-phase oriented personnel policy' as a specific element of an organisation's overall human resource management. Human resource management, 'age-management' and 'senior policy strategies' are organisational measures to retain older workers longer in working life. Some organisations claim to have adopted 'age-aware' personnel policies, although a gap between intention and implementation has been noted (Rhebergen and Wognum, 1996; Walker, 1997a). While there are some studies addressing older workers' careers (e.g. Cahill and Salomone, 1987) or their training and development (e.g. Sterns and

Doverspike, 1988), research in human resource management and human resource development has mainly focused on promoting high-performance in companies (Whitfield and Poole, 1997) which tend to be staffed by younger rather than older workers. In contrast, providing career guidance and developing career-management skills have been put forward as key areas for the empowerment of older workers (Sultana, 2004; OECD, 2004).

There are signs that a more positive picture of the situation of older workers has started to evolve. The various collections of 'good practice' from companies provide evidence that systematic and focused actions can bring results (examples can be found in Fortuny et al., 2003; Reday-Mulvey, 2002; Eurofound, 1998; Walker, 1997a). There is also some evidence of interest in organisational research looking at the issue of competence development for older workers (e.g. Bakke and Lie, 2005; Hilsen and Steinum, 2006).

2.4.2.2. *Work competence* [7]: *skills, knowledge and attitudes*

An overemphasis on skills in information and communication technologies has been a feature of recent debates on work competence, although many researchers argue for a more balanced approach. The OECD DeSeCo project has proposed a holistic view of competence (Rychen and Salganick, 2003). The OECD's (2006) latest report on ageing and employment outlines a multidimensional and comprehensive approach to lifelong learning as a means to extend the careers of older workers. In the workplace, the generative, dynamic and reflexive concept of 'work process knowledge' provides a framework for 'understanding the complex knowledge required by employees in modern organisations' (Fischer et al., 2004). This concept encompasses both practical know-how and theoretical understanding, thus providing a framework for building partnerships between institutional formal vocational education and training and workplace learning (Fischer and Boreham, 2004).

Experience-based knowledge (Paloniemi, Chapter 6) has gained value as part of the broadened view of work competence. Paradoxically, however, parallel to this development, the value placed on employees with the longest years of experience has decreased (Tikkanen, 1998). There seems to be confusion about experience-based competence, which is hard to define. It

[7] The term 'competence' should be used cautiously as it can create confusion. Compared to the broad northern European meaning, it is used in a much narrower sense in some countries, especially in the UK and Australia. The term is to be understood in accordance with the former meaning in this chapter. (See also Cedefop's glossary, Tissot, 2004).

seems clear that the views of knowledge and skills in many companies continue to be narrow due to an excessive emphasis on technological skills, instead of viewing the latter as instrumental aspects of new competence and knowledge.

Four major issues concerning the work-competence of older workers are to be noted. First, as is evident from the above, older workers are seen to have shortcomings concerning information and communication technology. The results from Worktow (Tikkanen et al., 2002) suggested that the central challenge to older workers is how they manage to adjust their competence to the demands of new forms of work and changing working environments. Second, older workers are prone to suffer from the erosion of metacognitive skills, i.e. learning skills, which often relate to learning motivation and self-efficacy (see also Dworschak et al. in Chapter 14). Third, there are stereotypes about the competence and productivity of older workers, especially regarding their learning attitudes and skills. It has been pointed out that it is these attitudes that are the main obstacle to opening up employment opportunities for older workers (ILO, 2003).

It is perhaps surprising how little the discussion on retaining older workers has considered the motivation factor which relates to an older worker's perception of himself/herself as a respected worker whose competence is appreciated and needed. Figures on the prevalence of negative attitudes among employers towards older workers were outlined earlier in Section 2.3.2. A change of attitudes should also come from society at large, including work councils and social partners. Media can play a key role here (ILO, 2003) as shown by the 'positive age-talk' of the Finnish National Programme for Ageing Workers (Linkola, 2003).

The fourth factor is that the discussion on older workers' competence has typically been based on the 'deficit-approach', focusing on what they are lacking rather than their strengths. Negative attitudes are reinforced because of difficulties in being precise about the competences needed in various jobs, and the focus on technology skills. However, particularly in specialised professions, the exit of older workers meant the loss of valuable know-how to companies (Root and Zarrugh, 1987). Notwithstanding the above, some mentoring models have been developed for securing the transfer of older workers' experience-based competence to younger workers. With contradictory messages about the value of older workers and their work competence, the learning challenge for them is to be adaptive – to adjust themselves to potential adverse reality in workplaces – but also at the same time to tackle the demands of developmental learning (Ellström, 2003, p. 23).

Clearly, we need more knowledge about the competences in demand and how this is affected by age and experience. Workplace competence is context specific and an overall picture of it is typically carried in the heads of management as tacit knowledge. The challenge for research is to find more systematic ways to understand this. In this regard the Cedefop study *Typologies for knowledge, skills and competences* (Winterton et al., 2006) and the concept of work process knowledge (Fischer et al., 2004) are interesting. A clearer understanding of work competences could also assist in using the complementary competence of younger and older workers, and thus, help to narrow the intergenerational gap in workplaces.

2.4.2.3. *Continuing vocational training*

While it is vital that workers of all ages have good access to vocational training and lifelong learning activities (OECD, 2006) a common claim among employers is that older workers are not interested in training and development. However, the results of the Worktow study (Tikkanen et al., 2002) suggested that there is another side to the story. Long-established, experience-based and highly developed 'judgement-type' skills tend to make older workers highly critical consumers in the training market. They are also very pragmatic when considering training options, taking their organisations' overall situation into consideration and the task-related relevance of the training. SME training options in particular can be turned down for reasons related to time and other resources as well as the content and training methods.

A large part of the problem is that the long-term view of training and development work is rare in modern work organisations which are under enormous pressure. This means that training tends to be reactive, ad hoc, tailor-made and narrow-based, with no relevance beyond one particular company. Stuart and Perrett (in Chapter 15) point to the shortcomings of this kind of training in assisting people to deal with career changes.

During the last decade or so VET has been radically challenged by changes in the competence needs in working life. It has expanded its scope from purely institutional training to include non-formal and informal learning. In principle, at least, it now covers all adult age groups, placing much weight on continuing vocational training (Tessaring, 1999). However, among continuing vocational training practitioners – often younger workers themselves – and also among business consultants, interest in older workers has grown very slowly and is often completely absent.

2.4.2.4. *Role of trade unions*

The role trade unions play in promoting lifelong learning among their oldest members varies from union to union and from one country to another, although the importance assigned to lifelong learning among unions appears to be on rise (ILO, 2000). However, until recently, expanding the working careers of older workers has not been on their agenda. Towards the end of the 1990s, Walker concluded his European study by stating that there was no evidence of signs of 'partnership between the social partners on the way forward with regards to age and employment' (Walker, 1997a, p. 40). Today, there are signs that trade unions have started to adopt a more proactive role towards the training needs of older workers. As pointed out in Chapter 15 by Stuart and Perrett, trade unions in the UK are viewed as important conduits for advice on learning for older workers, in particular as approaching their employer in this regard is something they may wish to avoid. Tito Boeri, a professor of economics at the Bocconi University, wrote in the *Financial Times* (Boeri, 2003) that, while being outspoken on many topics, trade unions tend to be 'coy' when it comes to the age of their members. According to Boeri, labour unions need government support to solve the vicious circle of intergenerational conflict, pursuing policies on issues such as lifelong learning. It is also argued that lifelong learning has become the new employment security objective on the agenda of trade unions, as 'lifelong learning is becoming as important an entitlement for today's employee as the right for a pension became in the past' (ILO, 2003, p. 11).

2.4.3. **European lifelong learning policy**

While the concept of lifelong learning can trace its roots back to ancient times (McClintock, 1982) recent political discussions on this theme with its different titles (recurrent education, etc.) have been taking place since the 1960s with the debate being revitalised in the 1990s. As in the heuristics in Table 1, the main focus of the discussion on lifelong learning has mostly been at society level. Policy guidelines have been formulated by the OECD, EU, ILO, and Unesco. The G8 countries have underlined the importance of lifelong learning for everyone in the 'new economies' of the 'knowledge age'; it is also seen as one of the main strategies to combat unemployment. The new millennium has marked significant progress in EU policy formulations (Descy in Chapter 4 and Nyhan in Chapter 3). The Lisbon goals set in 2000 shifted the development of EU policies and practice to a new gear (Descy in Chapter 4). However, the degree to which the Member States have formulated their educational policies and practice to realise these goals varies considerably

as shown by the Cedefop/Eurydice survey *National actions to implement lifelong learning in Europe* (2001). By 2006, Member States are expected to have developed and implemented coherent and integrated comprehensive lifelong learning strategies as specified in the Education and Training 2010 report. This task is supported by Cedefop (Chisholm, 2004). It is now expected that these strategies will cover learning needs throughout the whole lifespan, including older workers and older people more generally.

Nordic countries in particular made considerable progress in promoting policies on older workers and lifelong learning even before the start of the new millennium. Examples include the Adult education initiative 1997-2002 (*Kunskapslyft*) in Sweden (Focus on lifelong learning among low educated), the National age programme 1998-2002 in Finland (mainly dealing with older workers, although goals for education and training were also included) and the more recent National initiative for senior workers 2001-05 in Norway (with a focus on older workers).

Overall, there is great variation between countries with regard to the practice of lifelong learning and the development of policies for older workers. The Nomad report (Tuijnman and Hellström, 2001) based on OECD data, shows that participation in adult education for the age group 55-65 years in the Nordic countries is higher (30 % on average) than other OECD countries (below 20 % on average). Eurostat ([8]) data also shows considerable differences between countries in participation in lifelong learning in 2002/03. The Nordic countries, the Netherlands and the UK are clearly differentiated from the rest along with Iceland, Norway and Switzerland, from outside the EU. In these countries the participation rates are nearly 20 percentage units above the EU average, which is less than 10 % (both EU-15 and EU-25) (see also Descy in Chapter 4).

The challenge for lifelong learning policies is to widen participation. Older workers are a particularly interesting group in this regard as, along with the lower-educated, they are hard to reach (Uden, 1996). A country which has already made significant progress in making lifelong learning a reality for older workers is Finland. The results of the national adult education surveys by Statistics Finland show that, during the 1990s, lower-educated 40-64 year old adults increased their participation in lifelong learning to an extent that the long-prevailing difference with higher-educated people has disappeared (Tikkanen and Paloniemi, 2005).

([8]) Available from Internet: http://europa.eu.int/comm/eurostat/ [cited 23.6.2006].

From the perspective of older workers, the crucial success of lifelong learning policies is in transcending the traditional administrative divide between working life and education, leading to an overall learning framework incorporating these two areas.

2.5. Overview of contributions in this book

2.5.1. Policies and review of statistics – Parts I and II

Against the backdrop of the above review of past and recent research, policy and practice debates on older workers and lifelong learning, this chapter now summarises and comments on the contributions to this debate by the authors in the different chapters of this book.

Chapter 3 by Barry Nyhan reviews EU policy-making with regard to older workers and their development. Taking up the European Commission's outline of issues to be tackled, he identifies the following policy-related priorities as needing attention: a need for new thinking about the distinctive contribution of older people in a life course perspective; the creation of sustainable work environments that provide flexible and quality work for older people; and the promotion of supportive, lifelong learning practices. Nyhan states that the adoption of radical new thinking about the relationship between ageing, working and learning is dependent on intergenerational and community based dialogue.

Chapter 4 by Pascaline Descy provides a statistical overview of the situation of older workers and their participation in learning. Besides outlining demographic data about participation in working life, Descy also presents an overview of the lifelong learning patterns of older people. Her chapter, based on surveys carried out in Europe, also considers data from Japan and the US. Overall, the statistics confirm the separateness of the two themes of this book: ageing workforce and lifelong learning. The increase in the absolute and proportional number of people in the age-group 45 years+ is not matched by an equivalent increase in participation in learning. The main message is that lifelong learning is not a reality for most older workers. Descy concludes that even if older workers prefer learning in informal settings, there is still a great need for learning and competence development within the formal education system.

Chapter 5 (Part II) by Toshio Ohsako and Yukiko Sawano describes the situation of older workers in the labour market in Japan against the background of the Japanese lifelong learning system. Japanese lifelong

learning is very broadly defined and commonly applied to everyday life contexts. For example, one of the main goals for lifelong learning is maintaining good health, with health being defined in a very broad way. Besides describing a change in the traditional position of older workers, the chapter outlines the high expectations that Japanese people have about lifelong learning helping them to deal with new economic realities. Thus, public and private training bodies are increasing their contribution to lifelong learning. Furthermore, the authors suggest that the changes from seniority-based promotion and pay to a competence and qualification based system in working life, may necessitate a more active role than heretofore for employers in promoting lifelong learning in workplaces.

2.5.2. Listening to the voice of older workers – Parts III and IV

A shortcoming in research on older workers since the early 1990s has been the absence of the voice of older workers themselves. Managerial and expert views have tended to dominate. The chapters in Parts III and IV set out to address this imbalance.

Susanna Paloniemi (Chapter 6), based on a phenomenographical study of Finnish workers, addresses the question of how older workers perceive the meaning of age, work experience and competence development. Her findings reveal that older workers' conceptions of age were mainly positive. Interestingly, while older workers underlined individual differences in motivation and activity as important factors, age as such was not considered as something negative. In the construction of professional identity, again older workers highlighted personal characteristics and work-related external factors rather than age as such. However, age did have an impact with regard to the cohort-relatedness of job-competence, and also with regard to educational background. Her study challenges the results of previous studies which showed that employers and management were dubious about the value of 'older age' and 'having experience'. Paloniemi suggests that one should avoid juxtaposing workers of different ages in workplaces and instead appreciate the different, complementary competences of different age groups. This requires systematising practices for sharing experience-based competence in workplaces.

Chapter 7 by Renée Fredericksen focuses on the importance assigned to learning and the 'utilisation of workplace knowledge' by older public sector workers in the US. The chapter discusses the work values that are most important to these employees, the degree to which they are satisfied with their workplace, and areas in which workplace conditions could improve. The

values of 'economic security', 'informal learning' (for personal development), and continuous formal development of knowledge and skills for use in the workplace ('ability utilisation') received the highest rankings. Most older workers reported that their abilities are utilised and that they are economically secure, but only half stated that their needs for personal development are satisfied. The main message arising from this chapter is that those older workers, who feel that their workplaces address the above named values, are more committed to their work and willing to postpone their retirement. The chapter concludes that workplaces which organise and value peoples' contributions and provide opportunities for learning and personal development could offset the trend towards early retirement. Thus, the anticipated labour shortages and rising dependency ratios in the US could be mitigated through promoting lifelong learning.

Chapter 8 by Leif Emil Hansen and Tom Nielsen draws on a Danish project that examined company measures to retain their unskilled male workers. The purpose of the project was to develop inclusive policies for older male workers through involving them in developing these policies. Barriers against the development of such policies included the following: differences in views between management and workers; workers' lack of trust in management; the lack of corporate social responsibility towards older workers; the practice of prioritising youth in managing structural change; and the attitudes of younger workers about senior policies. The authors conclude that a joint effort, involving management and trade unions, is needed to create the types of work practice that address the needs of low skilled, mature male workers. Above all, senior policies must take the voice of the older workers themselves into account.

Part IV comprises the personal stories of two older workers in facing the challenge of ageing and lifelong learning. The first, Titane Delaey's experience, is told in her own words, while the second, Carl's experience, is based on a research interview with Hanne Randle (Carl gave his approval for the text). These stories have many points of contact with the theoretical and research findings of the other chapters.

Chapter 9 by Titane Delaey relates her experience of participating in higher education as a mature student. While it shows that older students can be as successful as younger ones, it also gives an insight into how 'youth-oriented' our educational systems tend to be. Generally, it is older learners who have to adjust to the education and training environment rather than the other way around. While there are exceptions, work-related education and training provision is still tailored to meet the needs of younger, academic

learners. Delaey's experience also raises a question about the impact of a person's age on an employer's assessment of a new educational degree taken in later life. Delaey suggests that those with experience in working life who have taken a degree in later life should be valued more highly than those lacking work experience. Corresponding experiences in Finland in the late 1990s, receiving wide media coverage, showed that older unemployed persons who had taken degrees found that the degrees did not have market value: these graduates were considered too old for the job market.

The life story told by Hanne Randle in Chapter 10 is different. It shows the efforts of Carl, who was trained as a metal worker, in fighting unemployment as a mature adult through participation in training. As with so many other older employees made redundant, flexibility was a problem for him. His life situation did not allow him to consider many of the vacant situations as he felt bound by his family situation and other life circumstances. The local labour market did not allow him to set his own requirements. Instead, he had to take the labour-market demands as a starting point and adjust accordingly. For Carl this meant a radical change of occupation as he took up training in nursing, abandoning his long career in the metal industry sector. Carl's story shows how he negotiates his personal situation under changed circumstances and constructs new meaning in his work and life. Giving meaning to his new life situation included acknowledging losses but also appreciating new and unexpected experiences. As Chapter 15 by Stuart and Perrett shows, those older workers who manage to review their life situation in terms of new possibilities get back on their feet more quickly.

2.5.3. Theoretical and critical perspectives on policy – Part V

The three chapters in this part call for a review of the way that people understand the different stages of one's life course and pose critical questions about current policies.

Henning Salling Olesen in Chapter 11 argues for a life history approach based on the value of experience. He takes the subjective significance of work as a key factor and discusses the potential of older workers to make life transitions by means of lifelong learning. Salling Olesen's theoretical approach is based on the notion of 'identity formation' being a lifelong process in which learning or avoidance of learning (defence mechanisms) predominate. The way in which one manages critical life situations, such as redundancy and retirement during the course of one's life, are related to one's capacity for lifelong learning. The author proposes a learning way to

master change. Salling Olesen suggests that compared with the normal 'biography' approach, the life history approach can help generate new and more open life trajectories for people as they grow older.

Chapter 12 by Stephen Billett and Marianne van Woerkom takes as a starting point the limitations and vulnerability of older workers in a labour market that is becoming increasingly competitive and contested. They suggest that older workers are caught up in contradictory discourses about work and competence development. Older workers need workplace support to maintain their competence but this is often not available, given the preference for the recruitment of young people. In pointing out the marginal position of older workers in working life, the chapter compares the situation of older workers with other marginalised groups in working life, such as women in many societies. The chapter argues that older people need to take up a more active role and adopt a critical, personal engagement stand with regard to working life and competence development. This argumentation is based on a review of the position of older workers in Australia and certain parts of Europe. Except for some northern European countries, the authors paint a pessimistic scenario about the interest of government and industry in supporting older workers.

In Chapter 13 Barry Hake examines political discussions about investments for lifelong learning of older workers in the Netherlands. The situation in the Netherlands is examined in the context of the European Commission's Lisbon strategy which considers lifelong learning as the high road to a European knowledge economy by 2010. The chapter analyses the 'life-course savings regulation' – a policy instrument in the Netherlands – that encourages older workers to save for their own education and training to retain employability. As in other countries (e.g. the Nordic countries) the government of the Netherlands has made a major effort to bring about a change in thinking among employers, social partners and the public in general about how to deal with an ageing workforce. Hake argues that older workers are faced with the 'situated necessity' to continue learning to maintain their employability and increase their flexibility in the labour market. However, he criticises Dutch policies for placing too much stress on individual as distinct from collective and intergenerational responses. Hake argues for intergenerational solidarity and the reallocation of social resources from younger to older generations in the emerging knowledge society, which, he notes, is also increasingly becoming a 'greying society'. If this does not occur, the knowledge society will not be an inclusive society.

2.5.4. **Impact of workplace practices – Part VI**

Part VI comprises four chapters that look at the impact that work organisation, human resource management and learning policies have on addressing the older worker issue.

In Chapter 14, Bernd Dworschak, Hartmut Buck and Alexander Schletz review recent German research on the effect of age on work performance as well as discussing training and skill development. They talk about the need for 'ageing-appropriate' job design, for continuing training, as well as measures to address the management of occupational biographies at the company level. Like several of the authors in this volume, they stress the importance of a lifelong – whole of life – developmental approach. As well as the oldest workers, the group they believe needing attention in today's working life is the middle-aged generation. The chapter points out that the reasons for older workers' premature exit from the workplace are as much the non-age-friendly design of workplaces as the individual choice of the workers themselves. They call for workplaces where it is possible to 'grow old', and stress that overall working conditions, work organisation and task assignments are key elements in addressing the issue of an ageing workforce. Finally, when it comes to lifelong learning, the authors underline that it is also the responsibility of older workers themselves to take initiatives.

Chapter 15 by Mark Stuart and Robert Perrett (in common with Chapter 17 of Alison Fuller and Lorna Unwin) deals with the metal sector in the UK which, in recent years, has been affected greatly by restructuring. Using a biographical approach, Stuart and Perrett examine factors that contribute to the employability, or the lack of employability, of redundant steelworkers. The results revealed four possible types of intervention that can help workers to deal with the possibility and/or reality of redundancy:

(a) training and education within an overall life context;
(b) training and skill development in everyday working life;
(c) interventions to promote employability during the period of direct displacement (following the announcement of redundancy);
(d) learning and promotion of employability post-redundancy.

The chapter highlights the importance of developing change competences throughout the whole of one's working life. In line with Dworschak et al. (Chapter 14), Perrett and Stuart suggest that these can be promoted through organising work in ways that continuously foster workers' flexible skills and attitudes. They argue that trade union unions can play a significant role in helping older workers to reconstruct their lives through proactive interventions. For lower-skilled older workers these interventions could be

more important than formal training measures.

Chapter 16 by Albert Renkema and Max van der Kamp examines the effect of a national training support scheme – 'individual learning accounts' (ILAs) – on lower-educated older employees in the Netherlands. Based on a quasi-experimental study in two SMEs, one dealing with technology and the other the care of the elderly, the chapter examines two kinds of ILA effects: those on the learning intentions of older workers themselves and those on their organisations' learning culture. Different effects found in the two organisations are explained in relation to their different corporate training policies and practice, and the difference in the size and gender profile of the companies. The study showed that when an organisation already has a learning culture, such as existed in the elderly care organisation, a formal training scheme, such as ILAs, is better received. The results from the technology organisation showed the opposite effect of the ILAs' learning intervention due to the poor learning orientation of the organisation.

Chapter 17 by Alison Fuller and Lorna Unwin focuses on older workers aged 40-65 years, examining the relationship between learning at work and work organisation culture. Their study looked at two companies that had adopted different approaches to workforce development. The results showed that workers' reactions to organisational change (such as introducing flexibility through new forms of work and learning) varied depending on the workers' job status, individual dispositions, and the particular learning and organisational culture of the companies. In line with the findings of Stuart and Perrett, the authors conclude that factors related to past and present situations at work and in the labour-market influence how older workers respond to changes in the workplace. They suggest that managers who introduce new forms of work organisation should assess their knock-on effects on how people are managed, supported and developed, and assess the implications of these changes for different groups of workers.

2.6. Three key concluding points

The issue of older workers and lifelong learning is complex. Not only is it a question of looking at the relationship between work, age and learning, but these fields also have to be addressed at three levels, dealing with the individual, the organisation and society. Sections 2.1 to 2.4 have reviewed past and current research and policy discussions on ways to address these concerns. A degree of progress was observed but, more notable, the many

obstacles to integrating lifelong learning policies with age management policies for older workers were acknowledged.

Section 2.5 summarised the messages arising from the different authors who came together in a network to contribute to this book. An overview of these chapters showed that, to address the issue of the ageing workforce adequately, one must look at it from many sides. Economic, social and educational planning at the macro level must be accompanied by changes in work organisation at the company level. There is also a need to promote bottom-up change by listening to the views of older workers themselves about their concerns.

Although a variety of messages emerge from this book, three key points for consideration are:

(a) changing attitudes about the way that ageing is viewed in working life and society;

(b) building inclusive workplaces;

(c) creating partnerships for learning.

2.6.1. Changing attitudes to ageing

When addressing the learning and development needs of older workers, the culture and attitudes of individuals, organisations and society as a whole can be powerful, even if subtle, obstacles to change. There are many unspoken, taken-for-granted assumptions and practices working against employees on the basis of age. Abandoning these deep–rooted, if often hidden, attitudes and practices requires an awareness of their existence and an open acknowledgement of their impact (Tikkanen, 1998). This is the starting point for the adoption of new mind-sets.

The emergence of knowledge economies and societies and modern extended lifespans calls for a sophisticated understanding of competence development and productivity built on sound workplace value systems. 'Older age' brings both advantages and disadvantages to work performance, as does 'younger age'. Nobody can expect to be aged between 30 and 39 years for more than 10 years! The last 15 years of discussions about older workers, and more recently about lifelong learning, is a short period in which to change long established mind-sets and practices. Nevertheless, in some countries and companies at least, change is on the way. From these examples we have evidence that systematic, focused measures can make a difference at societal and organisational levels. These measures are proactive and constructive in promoting fulfilment in working life for today's population having a longer life expectancy.

2.6.2. **Building inclusive workplaces that focus on learning**

Private and public work organisations need to recognise the crucial role they play in making lifelong learning a reality for older workers. However, discussions on 'inclusive workplaces' for older workers have so far not addressed the inclusion of older workers in the world of learning. Typically, organisational policies on older worker relate to health and safety topics that are not major concerns for human resource departments. Thus, the latter tend to offer less to older than younger workers.

Although the role of companies is important, on their own their capacity to make an impact can be limited and, in SMEs, often non-existent. In line with the conclusions of other related reports, such as *Working beyond 60* (Reday-Mulvey, 2005) and *Live longer, work longer* (OECD, 2006) there is a need for support from government, employer associations, trade unions and civil society. Cooperation between all the different stakeholders is a prerequisite for building sustainable company policies. Furthermore, for the implementation of lifelong learning, it is vital that training providers are included in this dialogue. Discussions on lifelong learning have tended to leave the responsibility for employability on the shoulders of individuals. Several authors in this book state that it is necessary to balance this with organisational and societal perspectives.

Flexibility in competence is a quality which develops over a long period of time through one's relationship with one's job. Older workers in jobs with limited options for learning may have learned to be helpless regarding their work competence although paradoxically, they can be active learners in other domains (Tikkanen, 1998). Unless one's job and work organisation provide opportunities to develop flexible skills and nurture positive learning attitudes during the earlier and intermediate phases of one's career, there is a danger that flexibility towards the end of a career can be a problem (Dworschak et al., Chapter 14). In addition, while flexible skills can present a challenge to older workers (Fuller and Unwin in Chapter 17) promoting competence diversity throughout the company is fundamental to promoting workforce diversity, which in turn can lead to greater flexibility and higher productivity.

2.6.3. **Creating partnerships for learning: role of training providers and trade unions**

Accounts of formal training providers are rare in the chapters of this book. This reflects both the fact that older workers prefer learning in informal and/or non-formal settings in the workplace and also the low interest that training

providers show towards this particular group. This seems also to be the case for working life consultants. In making learning more attractive to older workers, learning providers need to increase their awareness of the needs of older workers and employ the most relevant training methods and forms of provision. The challenge is to develop learning-supportive approaches that respect the experiential learning background of older workers and particularly lower-educated older workers.

Services offering guidance about lifelong learning opportunities need to be more widely accessible to older workers. While training providers and employment authorities may offer educational and career guidance, a combination of older age as well as an unfamiliarity with the world of learning makes it difficult for older workers to take the first step in seeking guidance. In fact, they tend to experience difficulties even in approaching employers about this. There is a need for cooperation between human resource development departments in companies and learning and training specialists in addressing this.

With increasing age a major concern is the meaningfulness of one's activities. As a basic human activity, learning is always meaningful but, in the context of work, motivation becomes an important issue. Many older workers have concerns about exposing their competence needs and their low educational backgrounds. When it comes to promoting greater access to training, trade unions can no longer turn a blind eye to their older members about extending their working careers. In fact, as Stuart and Perrett in Chapter 15 show, trade unions can be more influential than training institutions in communicating the message about the importance of lifelong learning to older workers.

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New policy thinking on the relationship between age, work and learning

Barry Nyhan

Abstract

The European population is ageing rapidly due to an increase in life expectation and a fall in birth rates. This means growth among older age groups, both absolutely and as a proportion of the population. From a working life perspective, Europe is facing a dramatic change in the balance among the different age groups at work. This has been the subject of policy debates stimulated by the European Commission and the different Member States. This chapter, focusing on issues raised in recent European Commission policy documents, discusses them in relation to the recent research work and reflections of other commentators. The central message arising from all of these different sources is that there is a need for radical new thinking about how we envisage the relationship between ageing, working and learning.

3.1. Introduction

The Communication (Green paper) from the European Commission (EC, 2005a), entitled *Confronting demographic change: a new solidarity between the generations* outlines the following stark figures about the ageing European workforce:

(a) the total working population (15-64 years of age) is expected to fall by 20.8 million between 2005 and 2030 (op. cit., p. 2);

(b) in 2009, the size of the youngest working age group (15-24 years) will begin to dive below the size of the oldest group (55-64 years) see Figure 1 (op. cit., p. 20;);

(c) by 2050, there are expected to be 66 million persons of 55-64 years of age and only 48 million of 15-24 years (op. cit., p. 20) (for a detailed

picture of demographic trends in the EU and comparisons with other countries, see Chapter 4 by Descy).

Figure 1. **Absolute size in millions of young and old age groups for EU-25, 1995-2030**

Source: EC, 2005, p.20.   15-24   55-64
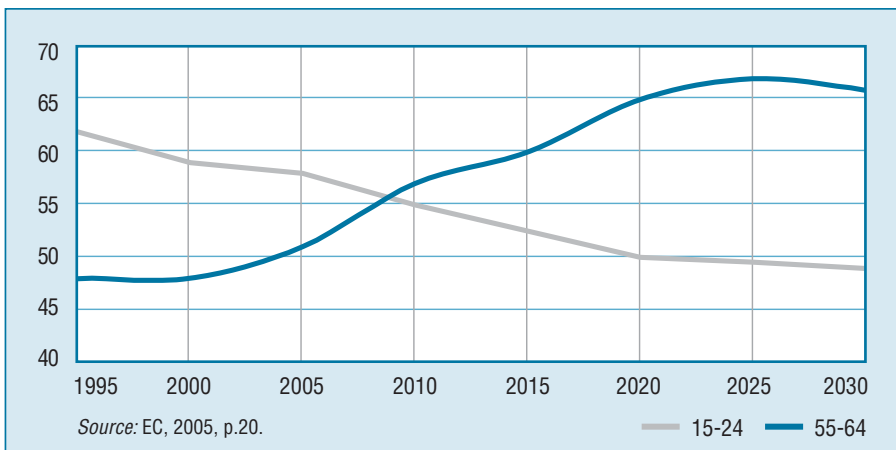
A financial consequence of these forecasts which has alarmed policy-makers [9] is that, unless urgent actions are taken, there will be fewer people in employment in the future to support the increasing number in retirement and this at a time when pensions and health care costs are expected to rise significantly (EC, 2002a). It is not a surprise, therefore, that current policy debates about an ageing Europe have been overshadowed by discussions on pension reform and increasing the age at which people are entitled to take their retirement pension. However, according to Vladimir Spiňdla, European Commissioner for Employment and Social Affairs, the problem of an 'ageing Europe' needs to be addressed from many other perspectives.

In March 2005, at the launch of the above mentioned Green paper, Mr Spiňdla stated that:

'The issues are much broader than pension reform. Addressing these issues will affect almost every aspect of our lives, for example the way businesses operate and work is organised, our urban planning, the design of flats and public transport. All age groups will be affected as people live longer and enjoy better health, the birth rate falls and our workforce shrinks' (EC, 2005b).

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[9] It should be pointed out that these demographic forecasts have been known for a long time.

An earlier European Commission document *Increasing labour force participation and promoting active ageing* (EC, 2002b) outlined a range of issues on working life that need to be tackled in an integrated way to address the problem of an ageing Europe. These are:

(a) the adoption of a 'dynamic life cycle approach' to a person's life;
(b) the creation of more jobs, while at the same time ensuring better quality in work;
(c) making sure that the financial rewards for working are sufficient;
(d) supporting higher and adaptable skills at work through lifelong learning;
(e) creating a supportive environment so that work is a real option for older people;
(f) building partnerships between the different public and private stakeholders to ensure that the above actions are implemented (EC, 2002b, pp. 9-12).

This chapter discusses these issues, synthesising them in terms of three key and interdependent shifts in political thinking that need to take place with regard to our understanding of the interrelationship between ageing, working and learning.

The necessary changes are summarised below and then elaborated as the chapter progresses.

3.1.1. First area of change: new thinking about the distinctive contribution of older people in a life course perspective

A shift in thinking is required concerning attitudes to the relationship between ageing and performance at work. Much current political debate appears to be about keeping older workers (55 years +) ([10]) longer at work but not highlighting or valuing the distinctive contribution that they can make based on their life experiences. Being older is often taken to mean that one lacks relevant competences – often meaning formal qualifications – or even being incapable of or unwilling to learn or change. This is the reason why labour-market practices in the past favoured early retirement of older workers as a solution to organisational change. Workers themselves have often gone along with the view that being older means being out of date, so they did not feel wanted/valued and they longed for early retirement. However, thinking in a life course perspective, according to which one moves through different

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([10]) In this chapter an older person is defined as one who is over 55 years of age which relates to the 'older worker' age group for which the EU has set an employment participation target for 2010 in line with the Lisbon goals (see Section 3.2.1.). For a note on the definition of the term 'older worker' see Box 1 in Chapter 1, Section 1.1.

phases of one's life, tackling new challenges and using different kinds of expertise, needs to be taken on board by society at large. Walker (2002) talks about a 'life course perspective on active ageing'. Erikson (1980) outlines the different identity challenges that one goes through in the different phases of one's life.

3.1.2. **Second area of change: creating sustainable work environments that provide flexible and quality work for older people**

The second key factor to be tackled is the nature of work patterns in today's economy. Many commentators are concerned with the growing intensity of modern working life in which people are working longer (often spending a long time travelling to and from work) and are under greater pressure at work. This gives rise to stress (health problems) and raises questions about the sustainability of current practices in the long run (Docherty et al., 2002). This is a complex issue that must be discussed in the context of maintaining competitiveness and battling unemployment in today's globalised economy and shifting labour markets. It raises questions about the quality of work that are wider than the demographic problem of an ageing Europe. But, the issue of quality work is recognised as a central issue if older people are to be attracted to staying on in the workforce (EC, 2002b). The challenge is not just about making sure that people adapt to the realities of modern work but also adapting work to the needs of people as they grow older. The European Commission (EC, 2002b) document states that the building of what can be termed a 'sustainable work environment' calls for partnerships between the different public and private stakeholders. This can often be done best through partnerships at a local community level where the different but interrelated problems can be addressed directly. The building of a 'new solidarity between the generations' (EC, 2005a) is more manageable at a local level.

3.1.3. **Third area of change: promoting supportive community-oriented lifelong learning in a life course context**

The third key factor is the adoption of lifelong learning practices which are in line with the life course concept and the community solidarity approach discussed above. In this sense lifelong learning is seen as a communal activity in which people support each other, but in particular, the strong support the weak. It is about training in new and changing skills but it must entail much more than training through providing support and guidance to older people to make transitions (OECD/EC, 2004) and helping people to

find meaning in facing the different challenges and phases of their lives. This is about people learning together through democratic dialogue in their work organisations and their local communities.

These three key issues raise dilemmas about age, work and learning in our modern society. Not only must they be addressed in an interdependent way but they also call for more general changes in society at large about the place and role of work and learning in our lives. They are discussed in the remaining sections of this chapter against this wider backdrop.

3.2. The contribution of older people in a life course perspective

The assumptions which many policy-makers and employers have about age need to be examined. Despite policy declarations about the need to employ older workers, the labour market tends to continue to favour the recruitment and/or retention of young people over older people. People are often seen to be 'past it' even when they reach 45 years of age. The feelings of rejection, worthlessness and anger, experienced by older people are well articulated by the journalist Andrew Taylor of the *Sunday Times* (2005). The excerpt below is from a column he wrote in response to an earlier column about older workers being discarded:

'I had no idea: the postbag that flooded in after my first aftershock column in The *Sunday Times* revealed a couple of hundred angry men and women who had worked all their lives and now realised they were not only unemployed, but maybe unemployable. Executives who had been running successful companies now found themselves being patronised by sharp-suited youngsters. "The government is encouraging older people to stay on working beyond retirement age to ease the pension crisis", wrote one reader. "When will they really do something to assist people who have been made redundant in their fifties and are being discriminated against when they try to re-enter the job marketplace?" "From an employer point of view we are reliable, know the value of employment and take a professional pride in our work", said another. "Can the government afford 50 % of the over fifty to be inactive? We pay a lot of tax, have good spending power and 30 active years ahead of us"' (also see Fredericksen's account of the view of older public sector workers in the US in Chapter 7).

Because the proportion of younger people with better formal qualifications is greater than that of older people, they are seen to be more flexible, open

to change and learning; they also cost an organisation less money. The behaviour of the labour market seems to say that younger people are a better investment. Traditional, but also current, views are that older people are less productive and less able to adapt than younger people. In the recent past, in particular during the 1980s and up to the early 1990s, many companies were glad to adopt policies of early retirement that entailed replacing older people with younger people or perhaps often not replacing them at all. In many cases, older people felt that they had no option but to accept early retirement or redundancy as their contribution was no longer valued in the firm. These attitudes are still prevalent and need to be challenged if we are to address the age imbalance in the workforce.

In particular, it is essential to give a voice to older workers. Many of them feel undervalued and discouraged. Current discourses about pension reform and later retirements tend to be taking place in arenas in which older workers do not participate. They feel that they are being subjected to top-down proposals or edicts from governments. It is not surprising, therefore, that these proposals are meeting stiff resistance as exemplified by recent debates and protests in many countries.

3.2.1. An active ageing perspective
In contrast with the above views on the impact of ageing on a decline in work performance, the competing concept of 'active ageing' has been gaining currency in some quarters in Europe in recent years. 'Active ageing' means 'replacing those relationships, activities and roles of middle age with new ones to maintain activities and life satisfaction' (Walker, 2002, p. 122). This non-deterministic view of ageing means taking on new challenges as one goes through what the European Commission (EC, 2002b) document terms a 'dynamic life cycle'. Thus, while older people may not have, for example, up-to-date information and communication technology skills, they do have valuable life experiences giving them important cognitive and personal competences and work-ethic virtues. So companies have to think about what they are losing in letting older workers leave their companies. Dworschak et al. (Chapter 14) show that people's cognitive, personal and interpersonal competences can remain strong well into old age. There are no inevitable deterministic processes linking ageing with the loss of competence (also see Paloniemi, Chapter 6). Individual circumstances, the type of work undertaken, external influences such as the existence or lack of workplace support systems, internal individual motivation all play their part. In an integrated societal perspective, older people have distinctive competences

that young people do not have. In fact, a balanced mix of different age groups in an organisation supports the necessary intergenerational learning required in sustainable societies (see also Tikkanen et al., 2002 on why older workers are appreciated by their employers in SMEs).

It is essential, therefore, to look at each person's life as a dynamic life course. Employment and social policies should aim to maximise each individual's capacity to participate over his or her whole life course. People's wishes have to be considered while also requiring them to face up to demographic realities in society; they must also, unfortunately, pay the price for past policy mistakes. The life course perspective means that there are overlaps between the phases in one's life course, facilitating the transition between them. It also means undertaking work (understood in the broadest sense) as a challenging activity for every human being at every age (Heise and Meyer, 2005, pp. 252-266).

Against this background, the EU is addressing the issue of older workers' participation in the formal labour market. Member States meeting in EU Councils over the years have agreed on policies to increase the active involvement of older workers in the labour market. This is to address the situation in which employment for people aged 55+ in 2003 was 40.3 % of the age group (EC, 2005a, p. 8). The goals for 2010 (the 'Lisbon goals') are that 50 % of the EU population in the 55-64 age group be in employment (Council of the EU, 2001). It was also agreed at a later Council that an increase of five years in the average EU age at which people stop working be targeted for by 2010 (Council of the EU, 2002). This would bring the average retirement age across the EU up to 64 years (see also Descy in Chapter 4). Sweden, which is renowned for its attention to the quality of the work environment and the role of work as a source of human fulfilment equally for women and men has one of the highest participation rate among 50-64 year olds (67 %) and the highest average retirement age (Leney et al., 2004).

According to the above authors, Denmark, Greece, Cyprus, Portugal, Finland and the UK are near to or already exceeding the target of 50 %. Those which are around the EU average of 40 % include the Czech Republic, Germany, Spain, Lithuania and the Netherlands. The following countries are at least 15 percentage points below the target of 50 % participation for older workers:Belgium, France, Italy, Hungary, Austria, Poland and Slovakia.

3.3. Creating sustainable work environments for all

The European Commission (EC, 2002b) states that 'The quality of the work environment and jobs offered will have an influence on entry into the labour market, but more particularly on the decision to stay in a job and in the labour market'. This leads us to take a look at what is happening in modern work environments, raising much broader questions than the issue of older workers, but having a major impact on the issue. Docherty et al. (2002), point out that work in much of the industrial world is increasingly becoming more intensive, leading to stress and lack of fulfilment. Many people cannot wait to get out of the 'rat race' and draw their pension. To address this issue Docherty et al. write about the need to create what they term 'sustainable work systems'.

3.3.1. Problems of working life imbalance

Docherty et al.,(2002, p. 8) point out that stress is affecting the productivity and sense of job satisfaction of many workers. They outline the disturbing picture emerging from European surveys on working conditions in the EU (from 1995 and 2000) showing that 28 % of employees are exposed to stress (Paoli and Merllié, 2001; OSHA, 2000). These studies show that, for many people, working conditions are not improving and, in some cases, are deteriorating. 'The "traditional" drudgeries of work, such as high physical and psychological load, physical health hazards and monotonous work are still there'.

It is also pointed out that, in the changing work environment, new problems are emerging in white collar work environments. Stress and burnout is to be found even in new forms of work which offer extensive degrees of freedom and variety. People are becoming consumed by work as the work-life balance is breaking down (see Ohsako and Sawano on *Karoshi* [death caused by overwork] in Japan in Section 5.2.5).

It is paradoxical that the new forms of work offering people autonomy and flexibility are contributing to stress and upsetting the balance and meaning in people's lives. Docherty et al. (2002) point out that 'vanishing bureaucratic boundaries' contribute in large part to the problem of stress. Some people never get away from work today because of the efficiency of modern communication facilities such as the Internet and mobile phones – they are always on call – having a negative impact on their work-life balance. Even though people hated the old fashioned bureaucracy, with its strict rules and

boundaries, the absence of any boundaries is giving rise to an equally oppressive flexibility.

Sennet (1998) notes that:

'Flexibility is used today as another way to lift the cures of oppression from capitalism. In attacking rigid bureaucracy and emphasising risk, it is claimed, flexibility gives people more freedom to shape their lives. In fact, the new order substitutes new controls rather than simply abolishing the rules of the past – but these new controls are also hard to understand. The new capitalism is an often illegible regime of power' (Sennet, 1998, pp. 9-10)

3.3.2. **Finding meaning in work: 'good work'**

Gardner et al. (2001) have written about the need for 'good work' (good quality work) which is about finding meaning in one's work [11]. They argue that work must be based on values that go beyond purely instrumental and economic perspectives. They elaborate on the nature of the work values that recall an earlier book by Schumacher (1980), having the same title. Schumacher argues that 'good work' enables us to fulfil the following three purposes:

'First, to provide necessary and useful goods and services; second, to enable every one of us to use and thereby perfect our gifts like good stewards; and third, to do so in service to, and in cooperation with, others, so as to liberate ourselves from our inborn egocentricity'.

This broad description of 'good work' makes it so central to people's lives at all ages that it is truly impossible to conceive of life at the human level without work in this broad sense. 'Without work, all life goes rotten', said Albert Camus, 'but when work is soulless, life stifles and dies'. Older people in particular must be able to find meaningful work giving them a sense of purpose and fulfilment, otherwise they will wish to withdraw [12].

Some older workers, paradoxically, have been able to find meaning in the stable environment of bureaucratic low skilled jobs. In writing about a man called Enrico who was a janitor for all of his working life, Sennet writes:

'He carved out a clear story for himself in which his experience accumulated materially and psychically; his life thus made sense to him as a linear narrative. Though a snob might dismiss Enrico as boring, he experienced the years as a

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[11] See also ILO paper on 'decent work', 2003.
[12] Commenting on the relationship between ageing and the growth or decline in knowledge, Joseph Joubert stated that 'age only robs a person of those qualities which are not related to wisdom'.

dramatic story moving forward repair by repair, interest payment by interest payment. The janitor felt he became the author of his life, and though he was a man low on the social scale, this narrative provided him a sense of self respect' (Sennet, 1998, p. 16).

Of course, low skilled work is usually low paid work with bad conditions, and changes are needed to improve the quality of work for people in this situation.

3.3.3. Better quality in working life

The European Commission document (EC, 2002b) outlines the different dimensions of quality work that would make it more attractive for older people. These are as follows:

(a) Good working conditions. In particular health and safety at the workplace must be ensured. In this regard public authorities and employers need to assess and control the risk factors relating to an increasingly ageing workforce (Dworschak et al., in Chapter 14).

(b) Balance between flexibility and security in contractual relationships. Part-time work with good working conditions and secure contracts is associated with higher participation rates among women and older workers. Conversely, part-time work, with fixed- term contracts, which people have no option but to take for pure financial reasons, is associated with higher exit rates into either unemployment or inactivity. The aim should be to find a balance between flexible and secure employment contracts, thus the newly coined term 'flexi-curity' ([13]).

(c) Satisfactory wage levels. Making work pay requires an examination of the interaction of wage levels, particularly at the lower end of the pay scale, and the incentives and disincentives built into the tax/benefit system. The relationship between minimum wages, social benefits and taxation on labour affects the decision of many low-skilled workers to participate or not in the labour market. This entails removing contradictory combinations of tax-benefit policies, where public policies encourage older people to continue working while company policies encourage people to retire early.

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[13] This term which is an amalgam of two words, 'flexibility' and 'security', has appeared in recent years.

The European Commission (EC, 2002b) goes on to state that:

'Labour market policies should be designed in such a way that they not only
ensure stability of decent and good jobs but also help disadvantaged people
trapped in low quality jobs to get better ones. Restrictions preventing entry to
the labour market in the first place should be avoided (EC, 2002b, p. 10).

'Getting to and from work is a major problem for many to take up an offer of
work. Provision of appropriate affordable transport facilities for low income
and disadvantaged groups would also have a positive impact on labour market
participation' (EC, 2002b, p. 11).

3.4. Promoting supportive community-oriented lifelong learning

Changes in work practices and new thinking in terms of a life course
approach to ageing will not come about without concerted learning by all the
stakeholders in society. The approach to lifelong learning to match the life
course perspective means intergenerational community oriented learning in
which people support each other to learn how to manage change and make
the necessary life transitions.

Traditional approaches to training often do not take the experiences and
resources of older people into consideration. Lifelong learning (EC, 2001)
entails a shift from seeing learning as a passive process to a continuous
active one in which one engages in different forms of active learning in the
different periods of one's life – applying one's resources to new contexts.

3.4.1. Older workers receive little formal training

The European Commission (EC, 2002b) states that formal training is of the
utmost importance:

'Continuing to update skills during working life to respond to the changing
needs of the labour market is critical if older workers are to be kept in work
longer. Increased attention must be given to opening access to training to
people who are at higher risk of early exit from the labour market, such as low
skilled workers and women. Public authorities and companies need to invest
more in training for these workers.' (EC, 2002b, p. 11).

Leney et al. (2004) remind us that older people tend to have fewer formal
qualifications than younger workers and the uptake of training declines

sharply for older workers. According to the Labour Force Survey (Eurostat, 2003), just over 4 % of 55-64 year olds participate in formal education and training. Basic education has a fundamental long-term impact on participation in employment. The more educated, the more a person engages in further learning. In an unsupportive labour market, it is even more difficult for older workers to update existing skills and acquire new ones, hence the need for new training measures.

3.4.2. Lifelong learning in all aspects of life

It is essential to make formal training available on a regular basis, in particular for those at risk, but other kinds of learning and guidance are also important. The lifelong learning Memorandum (EC, 2001) refers to broader supportive learning on how 'to manage one's life'. This entails creating frameworks for learning in organisational and regional contexts through participative learning and harnessing informal learning in the day-to-day interactions at work or in the community. At a conference on the role of science in society (Trinity College Dublin, September 2005) Professor Ian Robertson pointed out that any form of new learning was a key factor in helping to stay sharp into old age: 'The more you learn, the more you can learn. It is known that new learning can have profound physiological effects on the brain'.

3.4.3. From training to learning: valorising experience and informal learning

In their survey of SMEs, Tikkanen et al. (2002) show that the older workers learn mainly in informal and non-formal learning situations (Box 5 in Chapter 4 of Descy). This is also borne out by European surveys which show that most of our learning is informal (Figure 9 in Chapter 4 of Descy and Figure 2 below).

However, there is much misunderstanding about what is meant by informal learning and how it takes place. A common misunderstanding is that informal learning somehow takes place all by itself. On the contrary, the promotion of informal and non-formal learning is dependent on the design of workplaces providing quality work in which people learn through having to undertake challenging tasks and learning with and from each other.

Drawing on studies by Ellström (2003) and Fischer (2003), Nyhan et al. (2003a) summarise the features of work that stimulate informal learning:

(a) variety in and control of one's work tasks;

(b) tasks that require the application of new knowledge thus offering possibilities for personal development;

Figure 2. **The contexts in which respondents think they have learned
something in the past 12 months, EU-15, %**

Context	%
Being at home	69.1
Getting together with other people	63.4
Leisure activities	50.8
Working (learning on the job)	44.0
At the workplace	41.1
Using local libraries/learning resource centres	31.6
Travelling, studying, working or living abroad	30.0
Involvement in social or political work	20.4
Training courses neither at work nor in formal learning settings	19.4
Attending training courses/sessions at the workplace	17.9
At school, college or university	16.8
A period of voluntary, social or military service	8.7
Courses that combine periods of study with work-based learning	7.2
As training placement/as part of an exchange programme	7.1

EU-15

Source: Cedefop, 2003, p. 15.

(c) opportunities for constructive feedback from managers, co-workers and
customers;

(d) time for reflection on work tasks that require deliberation and choice;

(e) possibilities for employee participation in shaping the design of the work
environment;

 (f) bottom-up 'active' learning, as distinct from 'passive' formalistic top-down
and standardised training;

(g) formal participation in problem handling and developmental activities.

This means that when people have to think for themselves and cooperate
with each other across an organisation – sharing their knowledge and
engaging in collaborative problem solving – they are learning new
competences and acquiring new knowledge from each other. The potential
for learning is increased when people have challenging tasks to undertake
and are facilitated to learn from doing those tasks through being supported
to reflect on, and learn from them. The type of work that promotes learning
can be called 'developmental work' (Ellström, 2003) meaning that it is
stretching people's potential, thus leading to their development. They are
learning because they are fulfilled in their work and they are working better
because they are constantly learning.

3.4.4. **Stress caused by lifelong learning**

Docherty et al. (2002, p. 10) bring us back down to earth when they point out that the need to be continuously learning can also cause stress and create imbalance in one's working life. 'The boundaryless job roles and versatile, continuously changing job contents are creating continuous need for employees to learn. Even though learning is an essential contributor for wellbeing, it can also become a source of stress'.

This brings us back to the need to devise suitable working environments and organisational learning systems that can address the problems of stress. As work is a social activity, these problems have to be addressed in an organisational or collective context and cannot be satisfactorily resolved on an individual basis by focusing on individual problems. There is need for supportive community environments within work organisations to promote what can be termed 'workplace wellbeing'. This is something to be placed on the agenda for attention because, as Docherty et al. point out, up to now society has not been able to devise the organisational and social frameworks to support people to deal with today's complex work environment. While this again is a general problem it is a major concern for older people who want to maintain their physical and mental wellbeing.

3.4.5. **Building local community partnerships for learning in learning regions**

Addressing the above problems is beyond the capacity of individual organisations, be they large or small; sustainable solutions entail taking a wider community perspective. National government public authorities play a key role in devising comprehensive policies that take economic and social complexities into account. However, this cannot be done without the support of a wide range of partners. Employers have to build work environments that ensure quality work and active learning that will entice older workers to stay longer at work. Trade unions have to negotiate working conditions and learning opportunities for older workers that bring benefits to them as individuals but also equally to their employers.

However, despite the importance of establishing broad national policies and legislation, these need to become a reality at the local or regional level. This calls for close cooperation between the different local bodies – public employment services, enterprises, trade unions, research and education and training organisations – to work together to devise and implement practical measures.

Through this kind of cooperation, the problems identified above, having

multi-faced economic, social, educational and personal dimensions, can be addressed in an integrated way. This kind of local community partnership, founded on democratic dialogue and participative learning, has been termed a 'learning region' in the sense that all stakeholders in a local area actively learn together to address a local problem (Nyhan et al., 2000; Fries-Guggenheim, 2003; and Gustavsen et al., forthcoming).

3.5. Concluding comments

This chapter has looked at the new policy thinking needed to address the issue of an ageing European workforce. The challenge is to build a sustainable European society from social and economic perspectives (Nyhan, 2003b). The issue of an ageing workforce raises an array of complex economic (e.g. competitiveness, cost of pensions) and socioeconomic challenges (e.g. health, social cohesion, learning).

These issues need to be addressed together in an integrated way to build a sustainable society. Docherty et al. (2002) state that sustainability in one area cannot be built on the exploitation of other areas. Society does not become sustainable through prioritising the goals and needs of some stakeholders at the expense of others.

Many older people feel that their voice is not being heard as they have no say in how the changes in pensions and work retirement are being introduced. This chapter argues for intergenerational, community based dialogue through which sustainable active ageing policies and practices are implemented to address the three central interconnected dimensions of human living: ageing, working and learning.

Lifelong learning must mirror the active ageing process. Thus, as people grow older, lifelong learning enables them to make the transitions between the different life course phases identified by Walker (2002): while still in one phase they begin to make preparations for the next. Following Walker's point that active ageing can only be ensured through partnerships between the state, public and private organisations and citizens – a mixture of top-down and bottom-up initiatives – lifelong learning should follow the same pattern. All work organisations must support active learning in the same sense as active ageing. Learning thus becomes part of the fabric of all work organisations – which become learning organisations (Nyhan et al., 2003) – as people are supported to find productive and fulfilling roles for themselves in their workplaces.

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Overview of the situation: Europe and beyond

CHAPTER 4
Review of European and international statistics

Pascaline Descy

Abstract

This chapter reviews the situation of older workers regarding lifelong learning, drawing on selected statistical indicators. As far as possible, comparisons are made between the EU, the US and Japan. The chapter underlines the importance of updating the skills of older workers to retain them in employment, a consequence of the ageing of the population and the low activity rates of older age groups. Older adults tend to cumulate disadvantages: they are less educated than younger age groups; they receive less formal continuing training; and the work experience and informal competence that they have acquired during their working life are not properly valorised. The reduction in the number of young people coming into the labour market accentuates renewal of workforce skills. In addition, the ageing population will intensify pressures on social security and pension funds. As a consequence, measures are needed to integrate inactive people in the labour force and to keep workers longer in employment. This implies increasing older adults' motivation to work but also changing employers' attitudes towards older workers.

4.1. Introduction

This chapter addresses the various issues related to an ageing workforce in the EU (and as far as possible in the US and Japan ([14])) through a set of selected statistical indicators It underlines the need to renew our vision of older workers' competence and lifelong learning. The first part of the chapter sets the scene, with a series of indicators on ageing scenarios, participation of older people in the labour market and the educational attainments of

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([14]) The author would like to express special thanks to Renée Fredericksen and Toshio Ohsako for gathering data for the US and Japan (also see Chapters 5 and 7 by these authors).

different age groups. The second part looks at participation in forms of
lifelong learning for older workers. It also presents selected results from the
Eurobarometer on lifelong learning to show older workers' preferences and
perceptions of learning.

4.2. Demographic developments, labour force participation and educational attainment

4.2.1. Demographic ageing

The extension of life expectancy and the fall in birth rates have resulted in
population ageing in developed countries. Figure 1 shows the ageing of the
EU-25 population by 2050, i.e. a decline in the number of young people,
while the number of those aged 65 years and older increases sharply.

Figure 1. *Current and future population in the EU-25*

Figures for 2000 correspond to the recorded average population.
Source : Eurostat, trend scenario (Baseline variant - 1 January population, base year 2004)
and population average, Newcronos database.
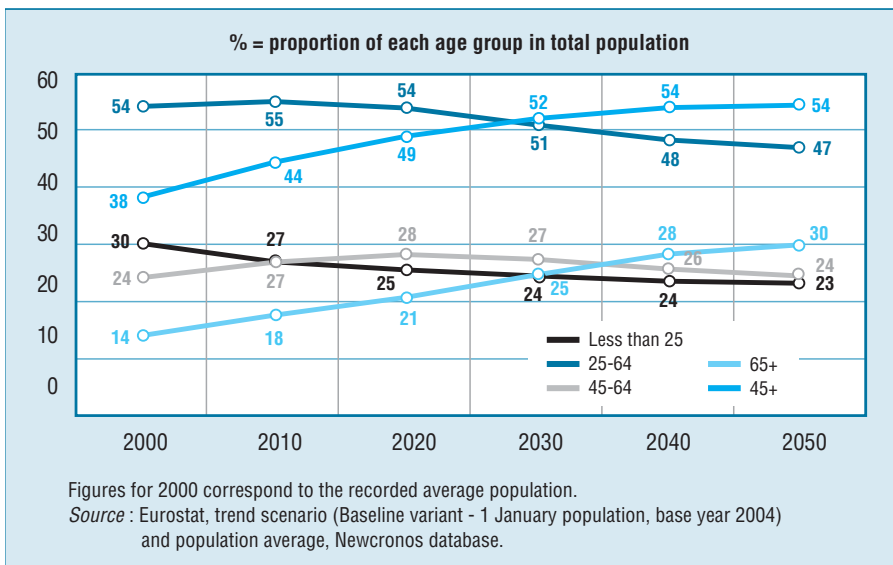
It is estimated that by 2050 the proportion of older people (65+) among the
total EU population will increase by 16 percentage points (from 14 % to
30 % on average in the EU-25). In a few countries, the proportion of people
older than 65 years is already equivalent to or above 20 % (Belgium,
Germany, France, Spain, Italy, Sweden; see Table 1).

Table 1. **Average population, distribution by age groups, by country, EU, Japan and the US, ranked by percentage of age group 45-64 (2002), %**

	less than 25	25-44	45-64	65+
Ireland	36	29	21	13
Cyprus	37	28	21	14
Spain	27	31	22	20
Lithuania	33	29	22	17
Luxembourg	29	31	23	17
France	30	27	23	20
Portugal	28	29	23	19
Greece	29	29	23	19
Slovakia	34	29	23	13
Belgium	28	28	23	20
Austria	28	30	24	19
United Kingdom	32	31	24	14
Poland	34	28	24	15
Italy	25	30	24	21
Latvia	30	28	24	18
Estonia	31	27	24	18
Netherlands	30	30	24	16
Sweden	28	26	24	21
EU-25	31	30	25	14
United States	17	41	25	17
Malta	34	27	25	15
Germany	26	29	25	20
Denmark	29	28	25	18
Slovenia	29	30	25	17
Hungary	29	27	26	18
Czech Republic	29	28	26	16
Finland	29	26	27	18
Japan	26	27	28	19

2001 data: CY, ES, average, MA.
2000 data: EL, UK, IT, EU-25 average.
Source: EU = Demographic statistics, Eurostat, NewCronos database; Japan = Statistics Bureau Ministry of Public Management, Home Affairs, Posts and Telecommunications 'Population Census' (total includes unknown age population); US = Current Population Survey, revised data incorporating population controls from Census 2000.

At the same time, the proportion of younger people less than 25 years of age will decline from 30 % in 2000 to 23 % in 2050. The consequence of these two trends will be a reduction in the working age population (aged 25-64). From 2040 on, the working age population will represent less than half the total population.

Figure 1 also shows the proportion of those who are termed as the 'older' working age population (45-64); after an increase by 2020 (up to 28 %). This will slightly reduce and stabilise around 24 % (its current level). The relative size of this age group varied across countries in 2002 (Table 1): 21 % in Ireland and Cyprus, 26 % in Hungary and the Czech Republic, and even 27 % in Finland. The reduction of the size of the younger cohorts means that the proportion of older (potential) workers (45-64 years) compared to younger (potential) workers (25-44 years) will change. Taking as a basis the EU-25 average, the current ratio of 0.8 old worker to one young worker is estimated to become 1.1:1 in 2050 ([15]).

Figure 2. **Current and future population in Japan**

Figures for 2000: total population, 1 October. Statistics Bureau Ministry of Public Management, Home Affairs, Posts and Telecommunications 'Population Census' (total includes unknown age population).
Source: National Institute of Population and Social Security Research. Middle series of the estimates for future population as of 1 October of the year stated based on the projections made in January 2002.

([15]) Building scenarios to answer the question of whether migration can counteract ageing in the EU (EC, 2002, p. 25), it appears that population size only grows significantly in 2050 if fertility rates exceed 1.8 (compared to 1.4 today) and if annual net migration exceeds 1.2 million (scenario taking EU-15 as a basis). Therefore, migration probably cannot stop or reverse the population ageing process but it could contribute to filling certain specific gaps or shortages in the labour market.

Although calculations are not provided for the same age groups, the drastic ageing of the Japanese population is illustrated in Figure 2. The population older than 65 years will almost double by 2050 in comparison with 2000. At the same time the working age population (15-64 years old) will decrease by 14 percentage points. The relative size of the younger age group diminishes as well. Already, the proportion of older workers in the population (people aged 45-64 years) is higher than in European countries (Table 1).

The US population is also ageing (Figure 3), although in a less pronounced manner. The proportion of people older than 65 years will increase by 10 percentage points by 2050, while that of young people (under 25 years) will tend to remain stable. The relative size of the working age population (25-64 years) will reduce and the proportion of older workers (45+) will increase.

Figure 3. *Current and future population in the US*

Figures for 2002: current population survey, revised data incorporating population controls from Census 2000.
Source: Current Population Survey, revised data incorporating population controls from Census 2000;
Projections: 2010-50: staff projections, Bureau of Labour Statistics.
ftp://ftp.bls.gov/pub/special.requests/ep/labor.force/clfa1050.txt and
ftp://ftp.bls.gov/pub/special.requests/ep/labor.force/cnpa1050.txt [cited 30/1/2005].

4.2.2. **Older people and active life**

Because of the dramatic consequences the ageing trend will have on public budgets, in particular on social security, governments and international organisations are concerned with the effects of ageing and a larger inactive and retired population. Various policies to retain people in active life and

delay the age of retirement are progressively being implemented. This goes hand in hand with an increased awareness of the importance of skill updating for the older age groups, to maintain employability and motivation to work (see for example the Lisbon Strategy, Box 1).

Box 1. **The Lisbon strategy**

At the Lisbon European Council (March 2000), the EU set itself a new strategic goal for the next decade: to become the most competitive and dynamic knowledge based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion. The strategy was designed to enable the Union to regain the conditions for full employment and to strengthen cohesion by 2010. As a result, Member States are asked to implement various kinds of policies to achieve selected targets, of which the following concern employment and lifelong learning:

- an overall EU employment rate (15-64) of 67 % in 2005 and 70 % by 2010;
- an employment rate for women of 57 % in 2005 and 60 % by 2010;
- an employment rate of 50 % of older workers (55-64) by 2010;
- an increase of about five years in the average age at which people stop working by 2010, i.e. an average retirement age of 64;
- an average level of participation in lifelong learning of at least 12.5 % of the adult working age population (25-64).

In 2003, the EU-25 employment of 15-64 was 63 % (55 % for women). Employment of older workers (55 64) was 40.2 % and the average retirement age was 61. Participation in lifelong learning was 9.4 % in the age group 25-64.

Sources: http://www.europa.eu.int/comm/employment_social/employment_strategy/index_en.htm
[cited 4.1.2005]; Council decision of 22 July 2003 on guidelines for the employment policies in the Member States (EC, 2003b); Eurostat, NewCronos database.

Raising employment is a major challenge in the EU as Table 2 shows: overall 41 % of 45-64 year olds are inactive ([16]) or unemployed. In addition, inactivity and part-time work increases with age. Women, in particular, tend to be inactive: up to 51 % in the age group 45-54 years, and 78 % in the age group 55-64 years. However, the percentage of active women working part-time is quite high in both age groups, at 29 % and 39 % respectively.

([16]) The term 'inactive' applies to all those who are not classified as employed or unemployed (including students and people in education and training).

Table 2. **Distribution of older workers by labour force status and age groups, EU-25, (2003), %**

	Total	Male	Female
45-54			
% employed	74	88	40
of which % part-time	(15)	(4)	(29)
% unemployed	6	4	9
% inactive	20	8	51
55-64			
% employed	40	56	19
of which % part-time	(22)	(10)	(39)
% unemployed	3	3	2
% inactive	57	40	78
45-64			
% employed	59	76	28
of which % part-time	(17)	(6)	(32)
% unemployed	4	4	5
% inactive	37	20	66

Source: Labour force survey, Eurostat, NewCronos database.

In the US, activity rates remain high in the older age group (55-64 years) in comparison with the EU, also for women (Table 3). Although the gender difference is also much less pronounced in the US than in the EU, women should also be a target group for activation policies across the Atlantic as they tend to be more inactive than men in all age groups.

Table 3. **Distribution of older workers by labour force status, by age
groups, US, (2003), %**

	Total	Male	Female
45-54			
% employed	79	84	77
% unemployed	3	4	3
% inactive	18	12	23
55-64			
% employed	60	66	55
% unemployed	3	3	2
% inactive	38	31	43
45-64			
% employed	71	77	66
% unemployed	3	4	3
% inactive	26	20	31

Source: Current population survey, 2000 Census, annual average 2003.

Box 2. **Employed, unemployed and inactive: definitions of the EU
Labour force survey**

Employed: all people who during the reference period were employees,
employers or self employed or family workers.
Unemployed: all people who during the reference period were without work,
available for work and looking actively for a job.
Inactive: all those who are not classified employed or unemployed
(including students and people in education and training).

On average in the EU the percentage of inactive people in the age group
45-64 years is around 37 %, but there are significant differences across
countries (from 20 % in Sweden to 47 % in Italy; Table 4). In nine EU
countries, above 40 % of people aged 45-64 years are inactive. Even in
countries where this inactivity rate is the lowest, it still represents one out of
five older adults of working age in Sweden and one out of four in Denmark,
who are neither working nor actively looking for a job.

Table 4. **Distribution of older workers by labour force status, age group 45-64 (2003), ranked by percentage of inactive, %**

	45-64		
	% employed	**% unemployed**	**% inactive**
Sweden	77	3	20
Denmark	73	3	24
Estonia	66	7	27
Lithuania	64	9	27
Finland	67	5	28
United Kingdom	69	2	29
Czech Republic	65	4	31
Cyprus	66	2	31
Portugal	65	3	32
Latvia	59	7	33
Germany	59	7	34
France	61	4	35
Slovakia	56	9	35
Netherlands	63	2	35
Ireland	61	2	37
Austria	57	3	40
Spain	55	4	41
Greece	56	2	41
Slovenia	55	2	42
Luxembourg	55	1	43
Poland	49	8	43
Hungary	53	2	44
Belgium	52	2	46
Italy	51	2	47
Malta	:	:	:

Malta: data not reliable
Source: Labour force survey, Eurostat, NewCronos database.

In 2002, participation in the EU labour market declined faster and earlier than had been the case in 1970. The decline was sharpest among lower-skilled men. The reasons most frequently cited by older workers for leaving their last job or business were: normal retirement (35 %); early retirement

(22 %); illness or disability (17 %) and dismissal or redundancy (13 %)
(Leney et al., 2004, pp. 100-102).

4.2.3. Educational level and age

Policies and interventions by employers and governments to update the skills
of the older segments of the population have to take into account that they
are less educated than their younger counterparts (Figure 4 for the EU ([17]);
Figure 6 for the US).

Figure 4. **Highest level of educational attainment by age groups,
EU-25 (2003)**

Source: Labour force survey, Eurostat, Newcronos database.
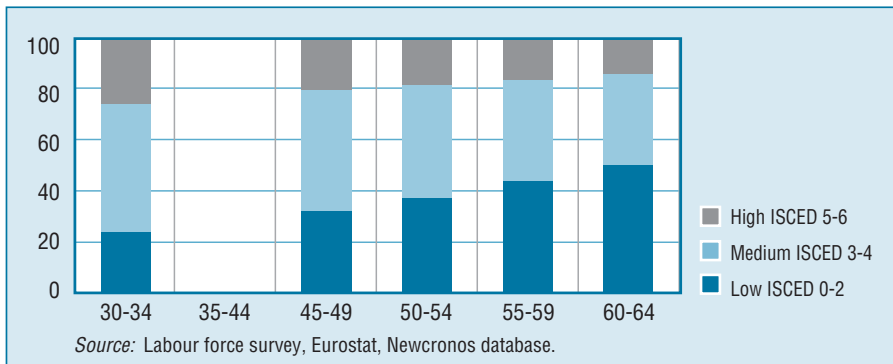
Figure 5. **Highest level of educational attainment by age groups,
US (2003)**

Source: Current population survey, 2000; Census, annual average 2003.
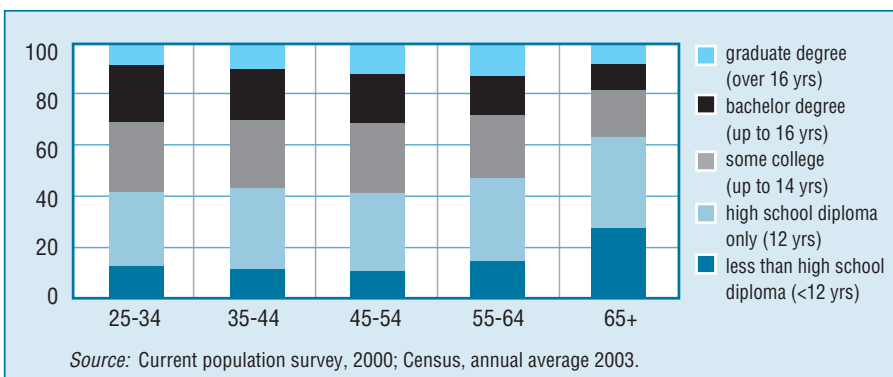
([17]) Data per country for the EU Member States are presented in Table 1 in the Annex following
Section 4.4.

In the EU, the number of people with a low level of education ([18]) reaches
50 % of the age group 60-64 years; this is true for a third of people aged 45-
49 years compared with 24 % among people aged 30-34 years. This
relatively low level of education of older workers must be seen in the context
of a general increase of the level of diplomas within the younger age groups.
In the age group 30-34 years the percentage of people with tertiary
education is now up to 26 %, while it is 20 % among those 45-49 years old
and 14 % among 60-64 years old. Overall, the situation is worse for women
than for men (Figure 5) although for younger age groups the educational
attainment between males and females tends to converge.

Figure 6. **Highest level of educational attainment by age groups and
by gender, EU-25 (2003)**

Source: Labour force survey, Eurostat, Newcronos database.
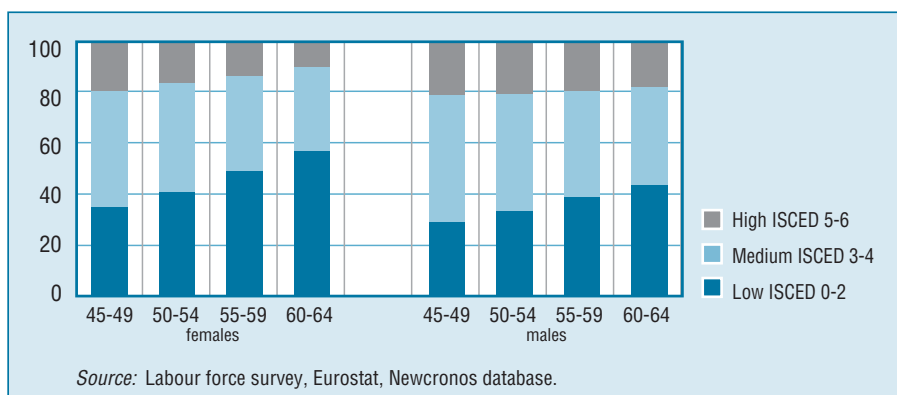
In the US, a large educational gap exists for people above 65 years in
comparison with the other age groups (28 % of those people did not
complete high school, i.e. undertake 12 years of education). Nevertheless,
overall, the educational level of the population is higher than in the EU. The
situation is also more homogenous across age groups than in the EU
regarding disparities in educational attainment. Women in younger age
groups (Figure 7) tend to have been better school achievers than men: a
higher percentage hold a bachelor's or graduate degree. For the age group
over 55 years, the situation is the opposite as men tend to have higher
educational attainment than women.

([18]) Level of education is defined following the ISCED classification (Unesco). Low: at best lower
secondary education (ISCED 0-2); Medium: upper secondary education or post-secondary non-
tertiary education (ISCED 3-4); High: Tertiary level education (ISCED 5-6).

Figure 7. **Highest level of educational attainment by age groups and
by gender, US (2003)**

Source: Current population survey, 2000 Census, annual average 2003.
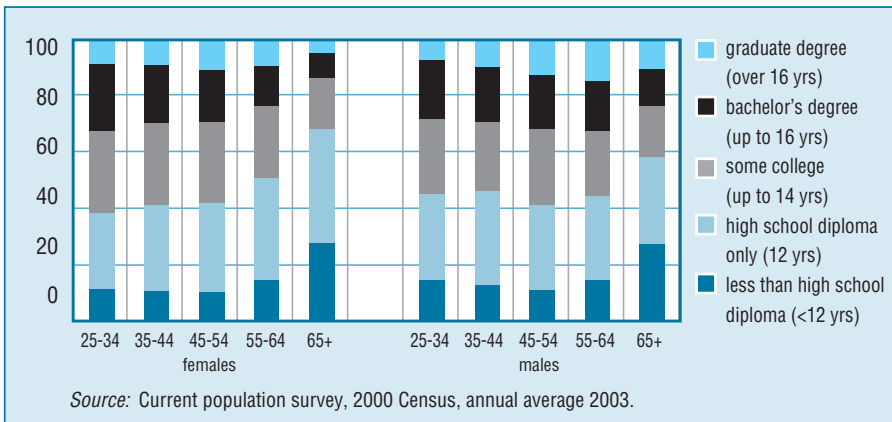
4.3. Lifelong learning

The data examined so far lead to the following conclusions for the working
age population with regard to access to lifelong learning:

(a) the reduction in the number of young people has a negative impact on
    workforce skill renewal to be expected from a new generation of workers.
    Skill renewal has to be ensured through continuing training of existing
    workers as well;

(b) pressures on social security and pension funds will intensify, increasing
    the need to maintain people longer in the labour force. In addition to early
    retirement, people are tending to stay longer in education. Consequently,
    the working population contributing to social security funds (and being
    active in the labour market) is diminishing compared to the proportion of
    the population depending on these funds. Measures are needed to
    integrate inactive people in the labour force, in particular women, and to
    keep people longer in employment as opposed to taking early retirement
    (Descy and Tessaring, 2005).

Continuing training of the labour force needs to be intensified to keep
workers' skills up-to-date, to increase motivation and retention rates, and to
ensure integration of the unemployed and inactive in the labour market.

Contrary to the need detected, participation in lifelong learning declines
with age without exception in all EU-25 countries. The distribution for the EU-

Figure 8. **Distribution of participation in lifelong learning by age groups, EU-25 (2003)**

	25-29	30-34	35-39	40-44	45-49	50-54	55-59
UK	3.7	3.7	3.9	3.5	2.9	2.3	1.9
SE	5.0	4.8	4.7	4.2	3.9	3.8	3.6
FI	4.0	2.7	2.8	2.8	2.4	2.2	1.6
SK	1.4	0.8	0.8	0.8	0.7	0.5	0.3
SI	5.2	3.4	2.5	1.9	1.9	1.1	0.6
PT	2.2		0.9		0.4	0.3	0.2
PL	2.3	1.0	0.8	0.5	0.5	0.2	0.1
AT	3.3	2.6	2.3	2.1	1.6	1.0	0.7
NL	3.6	3.3	3.1	2.8	2.1	1.6	1.0
MT	1.0		1.0				
HU	2.5	1.3	0.9	0.7	0.6	0.4	0.2
LU	1.8	0.9	1.3	1.3	0.9	0.4	0.4
LT	1.6	1.0	0.7	0.6	0.6		
LV	2.4	2.0	1.3	1.1	1.1	0.5	0.5
CY	2.6	1.5	1.5	1.2	0.9	0.6	0.3
IT	2.5	1.0	0.5	0.4	0.3	0.3	0.1
EI	2.6	1.8	1.6	1.4	1.2	0.9	0.6
FR	2.1	1.5	1.2	1.2	1.0	0.8	0.3
ES	2.9	1.2	0.8	0.6	0.4	0.2	0.2
EL	1.8	0.9	0.5	0.4	0.3	0.1	0.1
EE	2.9	1.1	1.0				
DE	2.4	1.1	1.0	0.8	0.6	0.5	0.3
DK	5.0	3.6	2.7	3.0	2.0	1.9	1.6
CZ	1.8	1.0	0.9	0.7	0.6	0.5	0.4
BE	1.9	1.7	1.5	1.5	1.3	0.8	0.5
EU-25	2.7	1.7	1.5	1.3	1.1	0.8	0.6

- Data not reliable enough to be published for some age groups
  in the following countries: Estonia, Lithuania, Malta, Portugal.
- Data not reliable for the following age groups (in parenthesis in the graph):
  30-34 Estonia; 35-39 Estonia; 40-44 Portugal; 45-49 Portugal;
  50-54 Latvia, Luxembourg; 55-59 Cyprus, Latvia, Luxembourg and Poland.

*Source:* Labour force survey, Eurostat, Newcronos database.

25 illustrated in Figure 8 needs no comment ([19]). While participation ([20]) in education and training is 14 % for the 25-29 year olds, this compares with 8 % for the 40-44 year olds and 4 % for the 55-64 year olds.

Although a correlation exists between age and participation in lifelong learning, higher chronological age is not an explanation by itself for low participation (Tikkanen, 1998, p. 16). Other variables such as level of educational attainment (Box 3), knowledge and skills acquired through informal and non-formal learning, interest in adult education or the attitude of the employer towards training of older workers may intervene in complex combinations with chronological age to explain the diminution of participation rates.

Box 3. **Effect of formal education and chronological age**

Tikkanen (1998), using cross sectional data from the 1990 Finnish Adult Education Survey, demonstrates that the effect of formal education on participation is stronger than the effect of chronological age. However, she also points at a combined effect of age and education: for the lower educated, participation in lifelong learning decreases with age whereas for the higher educated, it increases with age up to 55, the age at which it starts decreasing. Participation of the better educated remains higher than for the lower educated, independent of age.

Effect of formal education on participation in lifelong learning by age groups (N=1097)
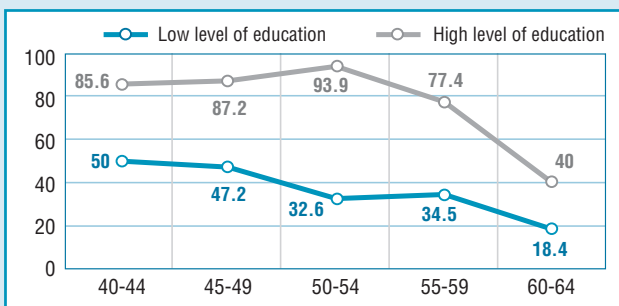
Source: Tikkanen, 1998, p. 23 based on Finnish adult education survey 1990.

([19]) Percentages may appear particularly low as the reference period for this variable of the Labour force survey (LFS) is the four weeks before the survey, which leads to a probable underestimation of participation in lifelong learning per year.

([20]) Participation rates use the total population of the same age group as a denominator (different from Figure 8, which shows the distribution across age group, i.e. the denominator is the total of participants in lifelong learning).

Box 4. **Participation in training of older workers in SMEs**

The project Working life changes and training of older workers (Worktow) was targeted at SMEs in Finland, Norway and the UK. On participation in training, it produced the following results:
- 78 % of employees have participated in training in the last three years, young workers somewhat more than the older (81 % versus 73 %);
- statistically significant differences concerning the type of training across age groups were only found for formal training (50 % of younger versus 34 % of older);
- for formal training, participation rates were about the same for older workers across work types (manual: 35.3 %; service: 33.8 %; office: 34.4 %);
- participation in non formal training varied among work types and was lowest among manual workers (manual: 0.0 %; service: 51.5 %; office: 35 %);
- on the job learning followed a similar pattern (manual: 0.0 %; service: 52.2 %; office: 42.5 %);
- compared to younger workers, training was more often paid by employers for older workers, especially non formal training (78.9 % versus 94 %).

Note: Young worker = less than 45 years old; older worker = more than 45 years old.
Source: Tikkanen et al., 2002, p. 50 52.

Some less formal types of learning, in a work environment, seem to suit older age groups while classroom instruction predominates for the younger age groups (Table 5) ([21]).

A recent Eurobarometer on lifelong learning designed by Cedefop ([22]) confirms the analysis above: age is strongly correlated with participation (Table 6) but it also influences how people learn. When asked where they think they have learned something during the preceding year, older people mention formal contexts much less than their younger counterparts (only 14 % of 55+ think they have learned something in a formal context), in contrast to non-formal and informal ones (Figure 9). Further, older people

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[21] Table 2 in the Annex (which follows Section 4.4) presents the participation by lifelong learning type in the US. Data being only available for the age group 16+, it was not included in the main body of this chapter.

[22] The Eurobarometer on lifelong learning was carried in 2002, covering EU-15 plus Iceland and Norway (Cedefop, 2003; Chisholm et al., 2004). The survey population sample is representative of the population aged 15+ for age, gender, NUTS2 region and urbanisation size (N = 18 007; total for all countries).

are less likely to prefer courses of any kind to update professional skills (49.6
% for those aged 40-54 years and 30.7 % for those aged 55+; Table 6)
(see Box 5 for definitions of formal, non-formal and informal learning).

Table 5. **Participation in lifelong learning by type of instruction for
different age groups, EU-25 (2003), %**

	Classroom instruction	Instruction in a working environment	Instruction combining both work experience and classroom instruction	Distance learning	Unknown + no answer
25-29	42.5	8.0	4.6	5.9	39.1
30-34	31.1	13.2	7.0	7.9	40.8
35-39	25.8	16.1	7.1	8.0	42.9
40-44	23.4	18.7	6.4	8.3	43.0
45-49	22.3	18.9	7.9	7.0	43.9
50-54	20.2	18.8	(6.5)	(6.0)	48.5
55-59	16.2	17.7	:	:	56.1
25-59	30.0	14.0	6.0	7.0	43.0

The Labour force survey (LFS) categories also foresee 'self-learning' and 'conference, seminars, workshops' but
no data are available.
Lifelong learning, according to the LFS, refers to any kind of education and training during the four weeks preceding
the survey.
Source: Labour force survey, Eurostat, Newronos database.

Table 6. **Selected results form the Eurobarometer on lifelong learning
(2002), %**

	Non-participants in lifelong learning by age group	Respondents preferring to take course of any kind for updating professional skills	Demotivated learners
15-24	40.7	59.0	1.4
25-39	62.1	53.9	3.8
40-54	66.9	49.6	7.8
55+	85.6	30.7	23.3

NB: Percentages refer to the proportion of the specific age group.
Source: Eurobarometer on lifelong learning; Chisholm et al., 2004, pp. 72, 74, 110.

Figure 9. **Proportion of respondents having learned something in the preceding year, by learning context and age groups (2002)**

Source: Eurobarometer on lifelong learning; Chisholm et al., 2004, p. 46.
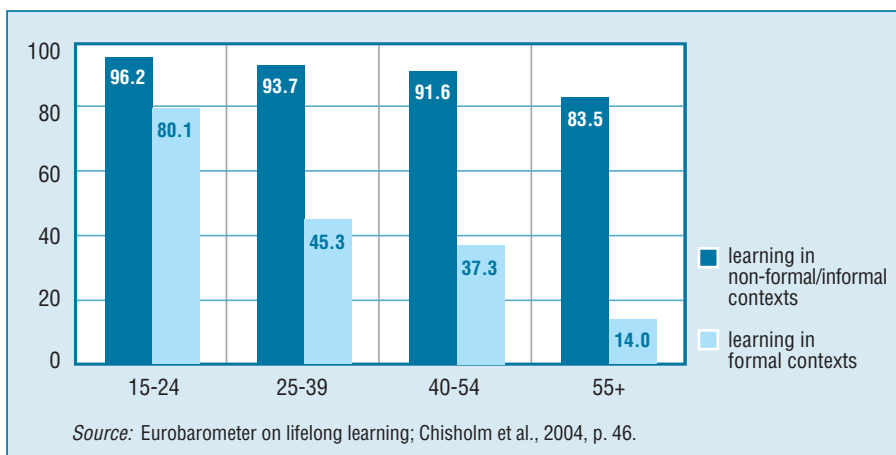
Box 5. **Definitions of formal, non-formal and informal learning**

Formal learning: learning that occurs in an organised and structured environment (in a school/training centre or on the job) and is explicitly designated as learning (in terms of objectives, time or resources). Formal learning is intentional from the learner's point of view. It typically leads to certification.

Non formal learning: learning which is embedded in planned activities not explicitly designated as learning (in terms of objectives, learning time or learning support), but which contain an important learning element. Non formal learning is intentional from the learner's point of view. It typically does not lead to certification.

Informal learning: learning resulting from daily work related, family or leisure activities. It is not organised or structured (in terms of objectives, time or learning support). Informal learning is usually, unintentional from the learner's perspective. It typically does not lead to certification.

Source: Tissot, 2004.

Finally, 11 % of the total Eurobarometer interviewees are defined as
demotivated ([23]) (Chisholm et al., 2004, pp. 74-75). This percentage
appears to increase with age: 23 % of people aged 55+ are demotivated
learners as compared to 8 % for age group 40-54, 4 % for age group 25-39
and 1 % for 15-24 (Table 6).

4.4. Conclusions

Successive periods of economic crisis, globalisation of markets and
increasing international competition, restructuring of economies towards
services and changing work organisation and production processes,
accompanied by the constantly increasing pace of technological progress,
have structurally changed economies. In turn, this influences the number and
the type of jobs available as well as the skill profile required by workers
(Descy and Tessaring, 2001, pp. 147-158). For an effectively functioning
labour market, it is now widely accepted that a level of education at least
equivalent to upper secondary education is the minimum needed.

However, it would be illusory to believe that every job requires a higher
level of and/or new skills. The polarisation of the labour market, with
knowledge-intensive highly skilled jobs on the one hand and more repetitive
and unskilled jobs on the other, appears increasingly to characterise our
economies (op. cit., pp. 158-165). To be in a relatively protected situation,
individuals are required to be employable, adaptable and preferably (highly)
skilled. This does not mean that there is no longer a demand for lower
qualified workers but they are more likely to be hired in the less stable
segments of the labour market, occupying more precarious jobs, in worse-off
industries or sectors (op. cit., pp. 352-370).

These changes in the demand for skills and the polarisation of labour
markets, give strong indications that older people may be becoming a more
vulnerable group in the labour market, partly because of skill obsolescence
and average lower qualifications (Chapter 15 by Stuart and Perrett).

([23]) The 'demotivated' are those who replied that in the past they did not participate in learning
activities and are not particularly interested; and that they would never want to undertake
education and training again in the future or that they would never want to improve/update their
professional skills or that they would never want to pay for this; and that they are too old to learn,
not good at learning or would not like to go back to something like school or that nothing could
encourage them to learn again.

In addition, the ageing population generates an increase in the relative proportion of older workers within the working age population. Thus, the number of older workers with obsolete skills will increase. Unless labour markets and lifelong learning adapt effectively, long-term difficulties are to be expected (Leney et al., 2004).

The need for older people to update and adapt their skills is a serious challenge, particularly since they tend to have fewer formal qualifications than younger workers and are under-represented in the uptake of training. Informal and non-formal types of learning at work tend to be preferred forms of training among older workers. There are also indications that older people are less aware of the range of learning possibilities and tend to be more demotivated about learning than young people. Moreover, some groups of older workers face cumulative disadvantages: they have a low level of formal education, they participate less in lifelong learning and they are less interested in learning.

Increasing and extending participation by older people in the labour market cannot be achieved simply by reducing early retirement and raising retirement ages. Training and learning need to be made available to older workers within the labour market and to those who want to return to work. More should also be known about specific sub-groups of older workers and their cumulative disadvantages so that appropriate targeted policies can be designed.

Furthermore, changes should be made to recruitment practices, job design and organisation of work, so that the older and younger workers who have taken recent training could be, and would be, considered at least equally attractive employees by employers. Experience, for example from Finland (Tikkanen et al., 2002), has shown that employers value recent training differently when they can choose between young and older workers, giving an advantage to the former. Thus, in recruitment and retention, recent training seems to increase the odds for employment far higher for younger workers than for older workers.

Recognising, acknowledging and rewarding the competence generated through work, experience and informal learning of older workers is necessary in addition to the provision of formal training. However, it must be recognised that these measures on their own cannot provide a solution to the complex issue of increasing the economic activity of older people.

4.5. Annex

Table 1. Highest level of educational attainment by age groups and by country (2003), %

Country	Age group	Low ISCED 0-2	Medium ISCED 3-4	High ISCED 5-6	Country	Age group	Low ISCED 0-2	Medium ISCED 3-4	High ISCED 5-6
Belgium	30-34	24	39	38	Ireland	30-34	25	41	34
	45-49	45	31	25		45-49	44	33	22
	50-54	46	32	23		50-54	53	29	18
	60-64	55	25	20		60-64	60	24	16
Czech Republic	30-34	6	81	13	Italy	30-34	42	44	14
	45-49	13	76	11		45-49	54	35	11
	50-54	15	75	10		50-54	61	29	11
	60-64	16	74	10		60-64	70	22	8
Denmark	30-34	15	48	38	Cyprus	30-34	16	44	40
	45-49	18	47	35		45-49	39	35	27
	50-54	15	55	31		50-54	49	27	24
	60-64	24	49	27		60-64	58	29	13
Germany	30-34	14	61	25	Latvia	30-34	12	70	19
	45-49	15	59	26		45-49	13	68	19
	50-54	17	58	25		50-54	20	64	16
	60-64	20	57	23		60-64	28	56	16
Estonia	30-34	(7)	65	28	Lithuania	30-34	9	66	25
	45-49	(7)	55	38		45-49	7	64	29
	50-54	11	56	33		50-54	13	68	20
	60-64	24	46	30		60-64	26	54	19
Greece	30-34	28	50	23	Luxe-mbourg	30-34	26	55	18
	45-49	48	35	17		45-49	35	53	12
	50-54	58	27	15		50-54	36	50	14
	60-64	67	21	12		60-64	38	50	13
Spain	30-34	45	21	34	Hungary	30-34	19	65	16
	45-49	63	17	20		45-49	23	62	15
	50-54	72	12	16		50-54	26	60	14
	60-64	79	9	12		60-64	33	51	15
France	30-34	23	43	34	Malta	30-34	71	17	13
	45-49	39	41	19		45-49	84	9	6
	50-54	43	39	18		50-54	NA	NA	NA
	60-64	49	35	15		60-64	NA	NA	NA

Country	Age group	Low ISCED 0-2	Medium ISCED 3-4	High ISCED 5-6	Country	Age group	Low ISCED 0-2	Medium ISCED 3-4	High ISCED 5-6
Netherlands	30-34	24	48	28	Slovakia	30-34	7	82	11
2002	45-49	35	41	25		45-49	14	73	13
	50-54	40	38	23		50-54	18	70	12
	60-64	44	34	21		60-64	24	67	9
Austria	30-34	14	68	18	Finland	30-34	14	44	42
	45-49	23	61	15		45-49	21	45	33
	50-54	28	58	14		50-54	32	39	29
	60-64	29	60	11		60-64	41	32	26
Poland	30-34	10	74	16	Sweden	30-34	9	60	31
	45-49	17	72	11		45-49	19	54	27
	50-54	23	67	10		50-54	22	52	26
	60-64	32	58	10		60-64	27	48	25
Portugal	30-34	69	16	15	United	30-34	11	56	33
	45-49	83	8	9	Kingdom	45-49	20	49	31
	50-54	86	7	7		50-54	23	48	29
	60-64	89	5	6		60-64	31	45	24
Slovenia	30-34	13	63	24					
	45-49	26	59	15					
	50-54	27	58	15					
	60-64	30	56	14					

Source: Labour force survey, Eurostat, NewCronos database.

Table 2. **Participation in lifelong learning by instruction type age group 16 and over, US (2000-01), %**

Total population surveyed	Classroom	Self learners	Conference, seminar or workshop	Work environment instruction	Work and classroom	Distance learning
198 803	46	63	25	49	–	–
753 640	–	–	–	–	–	100 (*)

(*)   1 276 two and four-year degree educational institutions representing a universe of 3 460 were surveyed in 1995. 33 % offered distance learning in 1995 and an additional 25 % planned to add distance learning opportunities by 1998 (source: US Department of Education, National Centre for Education Statistics, Post Secondary Education Quick Information System. Survey on Distance Education Courses Offered by Higher Education Institutions, 1995).

Source: National Household Education Surveys of 2001. Percentage of adults 16 years or older participating in selected adult education activities 2000-01 (September 2004) NCES 2004-050, US Department of Education, Institute of Education Sciences.

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CHAPTER 5
The situation in Japan

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Abstract

This chapter provides a review of recent developments and trends in the employment and status of Japanese workers over 45 years of age. It also looks at the emergence of new employment and work patterns, retirement policies and practices, and the historical development of lifelong learning in Japan, training and educating older workers. Reaffirming the importance of a learning society in which everyone continues to learn, it concludes that there are three crucial lifelong learning strategies that facilitate the retention of older workers in the labour market: development of self-efficacy/self-direction by older workers in pursuing career planning and vocational training; joint negotiation, organisation and delivery of vocational training and education programmes by public and private bodies; and the necessary legislative and policy measures that support and advance such programmes.

5.1. Demography and employment status of older workers

5.1.1. Demography

In 2004, Japan's population was 127.66 million, the ninth largest in the world. Life expectancy was 78.36 years for men and 85.33 years for women. As of September 2004, 931 000 people were over 90 years and 23 038 people were over 100 years old (*Population Census*, 2004). The oldest person was 114 years old. The top 10 oldest people were all women. The population over 45 years was 58 million, which constituted 46 % of the total population. The fertility rate in Japan was 3.65 per woman in 1950 but fell to 1.35 in 2000 (*Population Census*, 2004). It is predicted that by 2050, Japan's population will shrink by 27 million. In 2005, 20 % of the Japanese population will be over 65 years old and this figure will jump to 36 % in 2050.

Increasing longevity enables individuals to reinforce learning, work and leisure activities. The effective retirement age during 1997-2002 was 69.6 and 65.9 for men and women respectively (OECD, 2004, pp. 79-80) meaning that they can now live in retirement for 15 years and 25 years respectively. Women face a longer period of living alone, compelling them to prepare for a longer life. The situation is aggravated particularly for those women who have never worked. Therefore, public policies should consider the realities of women's lives and consider their learning needs to improve their employability and quality of life in late adulthood.

5.1.2. Employment status of older workers

In 2000, Japan's labour participation rate (including the employed and those unemployed but looking for a job) for people aged over 50 was 55 % (OECD average 44 %). In 2004, the employed (employed, self-employed, family worker) aged 45 and over constituted 48 % (29 % for men and 19 % for women) of the entire labour force of 67 million (*Labour force survey*, 2004). Unemployment for workers aged between 45-64 was 3.3 % compared to 4.8 % for the age group 25-44 ([24]).

Japanese people work considerably longer than their counterparts in OECD countries. Japanese workers aged over 50 work approximately 40.3 hours per week (OECD, 2004, pp. 136-138). They were given an average annual paid vacation of 18 days (2004) but the mean days taken were only eight.

Employed married women in 1960 were only 8.8 % but, in 1992, double income households started to outnumber single income households. Based on the data in the national survey on occupations and family life (conducted by the Japan Institute for Labour in 1995), Imada (1996) concluded that domestic duties had been reduced in double income households where the wife works full-time. When the wife worked part-time, she did nearly all of the housework. This situation seems unfavourable for women's work as well as for their training and lifelong learning activities.

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[24] People who were not in the labour force (without a job and did not intend to find one) constituted 40 % as of October 2004. Unemployment stood at 3.14 million (for 15 years and over) and 4.8 % (22 % for men and 12 % for women) of the labour force as of September 2004 (*Labour force survey*, 2004).

5.2. Emergence of new employment, working and retirement practices

5.2.1. Changing jobs

Worker educational level and age both tend to be negatively correlated with job change. Those who had changed jobs (and engaged in a new job) accounted for about 4.4 % of men and 6.3 % for women according to the *2002 employment status survey* conducted by the Ministry of Internal Affairs and Communications (2004). The results of the survey showed that 52.7 % of high school graduates had changed jobs and 38 % of university graduates had done so. Workers between 15 and 44 years old changed jobs nearly 3.5 times more (9.8 %) than their counterparts between 45 and 65 years old or more (3.5 %). A higher job turnover rate was observed for the workers who left the previous job voluntarily (due to poor business performance and uncertain future, low wages, bad work conditions, etc.) than those who left the job involuntary (bankruptcy, close down of office, personal entrenchment or encouraged retirement, etc.). Perhaps, if job change is self-initiated, people are more motivated to find a new job.

Japanese companies practice different redeployment schemes with workers in their mid 50s. The Shukko scheme transfers workers to another firm (often a subsidised one), with the originating firm retaining them as employees. The Tenseki scheme transfers workers to another firm (often to a subsidy company) under a contractual arrangement with the receiving firm. There are many reasons companies practice Shukko and Tenseki. The age of an employee is an important factor. Sato (1999) listed the following reasons: help the receiving firm's labour shortage; provide job security for employees beyond the mandatory retirement age; reduce the number of employees seeking a managerial post; reduce redundancy. Setting a retirement age for managers is often used by companies to deal with the surplus of college-educated white-collar employees (Sato, 1999). For example, Yakushoku-Teinen (retirement from a managerial post between ages 55-56) reduces labour costs. Although managers can stay in the same company until they reach the mandatory retirement age by accepting a lower post, most of them prefer to be transferred to a subsidiary firm or a company associated with their original company (Sato, 1999).

5.2.2. Contingent employment

The decade-long economic stagnation of 1991-2001 created an unprecedented level of unemployment in Japan. Lifetime employment, seniority-based wages and benefits became less and less relevant. Under the Japanese seniority-based life-employment system, workers' wage-increase depends on their tenure. Japanese companies have started to hire part-time workers and temporary workers to counter rising labour costs.

All non-full-time workers, or workers with temporary work contracts, are called 'contingent workers' (or non-regular) in Japan. Part-time workers are simply defined as those people who work less than 35 hours per week (Kezuka, 2000). There are four types of contingent workers (Morishima, 2001): temporary workers hired directly by the employer; sub-contracted workers (often by subsidy companies); workers hired by a temporary-help agency; and self-employed workers (who work less than 35 hours per week).

A 1999 survey of 6 813 establishments revealed that more than a quarter had non-regular workers. This survey showed that establishments doing well tended to increase both regular and non-regular employees, while those performing poorly tended to replace regular workers with non-regular workers (Morishima, 2001). Non-regular workers help firms to reduce labour costs but also provide them with a flexible labour force for different types and purposes of work. When companies are more concerned about the price of products than about quality, they tend to hire more non-regular workers. Morishima (2001) expressed a concern that contingent workers can become a threat to regular workers as they think the former might eventually replace the latter, the thought of which may lower regular employees' morale and also discourage their participation in training and learning. It is also possible that non-regular workers may manifest less loyalty and attachment to their companies than regular workers. This situation may also create attitudinal conflicts between the two groups.

The *2002 employment status survey* (2004) disclosed that there were 14.8 % and 42.2 % non-regular employees among male and female workers respectively. Non-regular work is sometimes advantageous for older workers because it allows them to decide on weekly working hours, job duration and location. However, non-regular workers are disadvantaged, compared with regular workers, in terms of working conditions, social security, salary, fringe benefits, training opportunities, etc. In 2001, employment insurance was introduced for part-timers to improve their situation. The average age of workers establishing new businesses has

recently risen, probably suggesting that middle-aged and older workers, who have been made redundant due to corporate restructuring, may be setting up their own businesses.

5.2.3. Volunteer activities

Volunteer activities, which are very relevant to the issue of older workers and more generally active ageing, have three main features: those that are self-initiated by individuals; non-profit making activities; and those activities that are beneficial to the public. Four main goals of volunteer activities have been identified: to promote self-development and self-actualisation of learners; to help participants to learn how to volunteer; to promote lifelong learning; and to bridge school, family and community. The *Survey on time use and leisure activities* (2001) revealed a high rate of participation in volunteer activities for the age group 40-44 (about 35 %). This remained the case until this cohort group reached 60-64 years but it declined to 25 % level in their 70s. Women's participation reached the highest level (43 %) in their early 40s.

Although the main promoters and implementers of volunteer activities are often non-governmental bodies and citizens, the Ministry of Education, Culture, Sports, Science and Technology (MEXT) is actively financing and coordinating them at the prefecture level, undertaking research, and providing technical support for establishing volunteer centres, volunteer data banks and the training of volunteers.

5.2.4. Ageism and mandatory retirement

Ageism is still strong in Japan, impacting on mandatory retirement and attitudes towards older workers. The 1994 pension reform raised the eligibility age for the National pension plan and Employers pension insurance from 60 to 65 years of age, to be fully implemented by 2025. However, further efforts are needed on the part of the authorities concerned. For example, a 2000 survey on employment management indicated that 91.3 % of firms with 30 or more regular employees set the mandatory retirement age at 60 (Fujimura, 2004). In addition, the age limit is frequently mentioned in job vacancy advertisements. Some 40 % of unemployed people aged 45-54 and 50 % of those aged 55-64 mentioned difficulty finding a job due to the age limits imposed (Genda, 2001). Some believe that Japan needs an anti-age discrimination law (like the one in the US) which outlaws a mandatory retirement age.

It is important for firms that extending mandatory retirement does not automatically increase the wage of older workers, as they believe that wages

and promotion should be determined by job performance, whether they are younger or older. Genda (2001) suggested the need for older workers to demonstrate their ability with certified qualifications and professional and specialised skills. Obtaining these may be easier if workers could foresee what types of vocational skill requirements they may face in the future and proactively plan and initiate their lifelong learning programmes at an earlier stage of career development.

5.2.5. **Workplace accidents and *Karoshi* (death from overwork)**

A key issue for older workers is maintaining good occupational safety and health standards at work. Every year there are more than half a million casualties in workplace accidents. The statistics compiled (during 1973-2001) by the Japan International Centre for the Occupational Safety and Health (JICOSH) revealed that 28 % and 14 % of on-the-job accidents related to the age groups 50-59 and 60-69, respectively (JICOSH, 2004). Extreme overtime (paid or unpaid) has a negative effect on the health of workers; suicides can result from depression caused by too heavy a workload. There were 143 cases of *Karoshi* (death from overwork) and 31 suicides in 2001 (Matsumoto, 2003). Those workers aged 40-44 are at the highest risk of *Karoshi*. Death from overwork can be prevented when supervisors learn to maintain their employees' workload at a reasonable level. The survey conducted by Rengo (Japanese Trade Union Confederation) in 2002, which targeted 23 000 workers, revealed that 17.8 % of the respondents had 'frequently' performed overtime service with half pay and 23.5 % of the respondents said that they 'occasionally' worked overtime without pay. The overtime culture (e.g. norms expected of an individual, overtime practices of colleagues) needs to be assessed to protect workers' health and quality of life. The Ministry of Health, Labour and Welfare is currently trying to introduce stricter regulations to supervise employees' working hours and to punish those firms that are engaged in 'outrageous' violations. While safety guidelines and penalty measures are needed, workers themselves need to share the responsibilities for occupational safety and health. Lifelong learning for workers is necessary to keep them mentally active and physically fit.

5.2.6. **Educational level and lifelong learning**

Japanese educational attainment for the age group 50-64 is expected to increase significantly over the next 20 years. This means that young workers (20 and over) will be much more educated than older workers. In 2025, 45 %

of older workers aged 50-64 will have tertiary level education (OECD, 2004, pp. 123-131).

Japan is doing relatively well in participation by older workers in job related training. In 1998, nearly 51 % of older workers (55+) participated in self-training programmes compared with the average participation (25 %) of counterparts in OECD countries. However, the gender gap is large at 60 % for men and 46 % for women (OECD, 2004, pp. 123-131).

5.3. Developing lifelong learning policies

5.3.1. Socioeconomic demands

The ageing population, economic and technological developments, globalisation, excessive competitive examination systems and heavily cognitive-oriented formal curricula, have had significant influence on the development of lifelong learning in Japan (Yamada et al., 2003). The shrinking young labour force compels older workers to stay longer in the labour market and to continue to update and improve their vocational skills. These workers cannot be exempted from the skill requirements of a high-tech society. The *Survey on time use and leisure activities* (2001) reported that 55 % of men and 35 % of women used the Internet. This figure remained constant over time but it fell below 10 % for both sexes starting at age 70. Exchanging and collecting information were the most popular modes of Internet use.

The acquisition of foreign languages (especially English) is essential for Japanese workers to remain effective in the global market. The globalisation of business affected Japanese employment practices and shifted the focus from traditional lifelong employment (where worker training programmes tend to be employer-driven) to more diversified employment patterns in which the emphasis is more on self-directed and flexible training programmes. To cope with rising social problems in schools (such as bullying, violence, children who do not want to attend school, etc.), educators are designing lifelong learning interventions. These foster the all-round personality development of students, helping learners develop a balanced personality (thinking and feeling), social and communication skills, empathetic attitudes towards others, and a healthy body and mind.

5.3.2. Japanese concept of lifelong learning

It is vital to achieve a lifelong learning society in which people can freely choose learning opportunities at any time during their lives and where proper recognition of their learning achievement is accorded (MEXT, 2004).

Japan attributes its miraculous economic achievements, particularly in the 1960s and 1970s, mainly to its highly skilled and devoted hard-working labour force. However, the staggering economy over the last decade forced the Japanese society, people and policy-makers to rethink the future direction of the country. Diplomas from prestigious educational institutions and hard work alone no longer make Japanese workers sufficiently effective in facing the new demands of the job market, which is less stable, diversified, and demanding of new and highly professional skills. Also, people have started thinking that, although steady economic growth is desirable, they have to achieve a better balance between working and family life and also between hard work and quality of life (good health, active social life, enjoying leisure and sports, etc.).

Japanese people, therefore, are comfortable with a broad definition of lifelong learning, which involves areas such as sports, cultural activities, hobbies, recreation, physical fitness and volunteer activities. They also have high expectations in terms of what lifelong learning can do to deal with these new economic realities.

5.3.3. Policies and historical overview of lifelong learning

The main goal of the lifelong learning policy is comprehensively to review various systems, including education, to create a lifelong learning society, and to implement lifelong learning concepts at all stages of life (MEXT, 2004).

The seed of lifelong learning was planted in Japan's *Social education law* enacted in 1949 which proclaimed learners' legal right to non-formal education at home, workplace, and other places outside formal the system. The creation of Kominkan (the largest community learning centres) promoted the implementation of this law.

From 1984 to 1987, national debates were led by the Ad Hoc Council for Educational Reform, which recommended to the Prime Minister that future education policy should have lifelong learning as its basic premise. The most fundamental educational reform goal, therefore, is a transition to a lifelong learning system.

The decentralisation reform of Prime Minister Yasuhiro Nakasone, which started in mid-1985, has been the most significant single factor affecting

lifelong learning. In 1990, the Japanese Parliament (DIET) enacted the *Law for the promotion of lifelong learning*. This law set a decentralisation course for lifelong learning at prefecture and municipal levels and established lifelong learning councils; these were decentralised bodies responsible for lifelong learning direction and policies. The decentralisation of lifelong learning also created a strong demand for public-private partnerships, which encouraged the establishment of many non-profit organisations, citizen groups and the private sector, as well as networks across municipalities for information sharing and the identification of experts on lifelong learning (Yamada et al., 2003).

5.4. Lifelong learning policies and support systems

5.4.1. Role of public agencies in retaining older people longer in working life

Various ministries are implementing a range of projects to pursue the broadly defined goals of lifelong learning. However, coordination across ministries is not an easy matter (Yamada et al., 2003).

5.4.1.1. *Ministry of Education, Science, Sports, Culture and Technology (MEXT)*

The MEXT leads lifelong learning policy developments and implementation. Currently, however, the MEXT's priority target group are not adults but young pupils and students in formal education. The MEXT's family education (child care and child rearing support in cooperation with the Ministry of Health, Labour and Welfare) aims at helping working parents, particularly by facilitating women's continued employment and learning. Career guidance programmes on management improvement and training of highly skilled professionals (including IT training) are provided in universities and local community facilities in cooperation with industry. The centres for cooperative research (in 62 universities in 2002) provide scientific technical training and advisory services to companies. The University of the Air (classes on radio and satellite television) support older workers in updating professional skills and acquiring new knowledge relevant to their work.

5.4.1.2. *Ministry of Health, Labour and Welfare*

The Workers' Life Department is adopting a lifelong learning orientation by promoting programmes for worker fulfilment and lifetime security in

workplaces, homes and communities throughout their lifetime. Programmes include: worker education to enjoy free time; saving money for retirement; participating in community volunteer activities; engaging in employer-employee negotiations; and getting advice on taking successive days (e.g. five days to one week) of paid leave for mental and physical refreshment (the refreshing system). The ministry also supports the retirement allowance mutual aid system for small and medium-size businesses.

The Employment Security Bureau provides various services at prefecture and municipal levels to assist firms employing older workers. The following services are offered:

(a) advisory service by older-worker/employment specialists (e.g. consultations on extension of mandatory retirement age, continuous employment, etc.);

(b) project planning (management system for older workers, improvement of working conditions, etc.);

(c) computer-based assessment and analysis for recruiting and employing older workers;

(d) joint research on employment issues for older workers;

(e) training aimed at vitalisation of workplaces through continuous employment for older workers;

(f) consultant service for reemployment and for work-life planning for middle-aged and older workers;

(g) age free project, advisory service for moderation of employment age.

There are nearly 600 public employment security offices across the country with vocational guidance officers dealing with job introductions, career counselling and advisory services (Matsumoto, 2003). Matsumoto highlighted recent directions in career counselling services, which are lifelong learning-based. First, public employment offices offer internship programmes to school students to increase their future vocational awareness. Second, the service supports middle-aged unemployed older workers facing difficulties due to the transition from a lifetime employment model to a 'self-reliance' one in which workers are more responsible for job search/change and developing vocational skills.

The Human Resources Development Bureau is establishing universities for professional competence development across the country, offering professional know-how skills to business and to those people who want to establish new businesses. The Lifelong Professional Ability Development Promotion Centre conducts research and training and provides information and counselling services to help white-collar professionals in skill upgrading.

The professional ability acquisition system enables white-collar workers to acquire professional skills and expertise through step-by-step programmes.

5.4.2. Government-industry joint programmes

The 1999 revision of the *Employment security law* relaxed regulations on job introduction services. This allows private human development resource firms to join with a wide range of human resource services and training programmes to adjust the balance of labour supply and demand (Matsumoto, 2003).

The government (particularly the Ministry of Health, Labour and Welfare) and private firms have various types of joint programmes to promote employment of older workers. Companies are not normally very enthusiastic about investing in older workers' skills as they think that such investment yields only a modest return. The government can reduce this market failure by supporting firms to create jobs and to develop training and education programmes for workers of all ages.

In addition, workers, particularly those who have once been unemployed, feel less motivated to undertake a training programme whose outcomes are only relevant to a specific firm. That is why the Ministry of Health, Labour and Welfare encourages worker self-training by providing them with financial support, especially for external training programmes, which are more flexible and relevant to worker needs.

5.4.3. Firm-based training to enhance employability of older workers

The primary recipients of firm-based vocational training systems (on-the-job and off-the-job training) in Japan have traditionally been young workers, particularly when the national economy enjoyed healthy and stable growth. In these systems, older workers played an important mentoring role in training younger workers. But the labour market paid little attention to older workers' own employability concerns. The Education Committee of the Japan Federation of Employers (Fujimura, 2004) defined employability as 'skills that enable worker mobility' and also 'skills that are demonstrated in a company that enable a worker to be employed on a continuous basis'. Older workers must now acquire both mobility and continuity dimensions of skill development, which once were primary objectives for young workers.

Fujimura (2004), who reviewed the results of two large scale company surveys, the *Basic vocational ability development survey* (JIL, 2001) ([25]) and

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([25]) The 2001 Survey involved a sample of 10 000 establishments of different types (corporate, foundations, universities, vocational training).

the *Fuji research survey* (FRIC, 2000), concluded that both employees and employers were starting to believe that employees should be mainly responsible for their own skill development and that they preferred long-term leave such as graduate study or overseas volunteer work. However, employers were reluctant for obvious reasons. Fujimura thinks it important to cultivate inter-company skills, particularly for those mid-career employees and older workers who face changing jobs or companies. To this end, he recommends the incorporation of on-the-job and off-the-job training, a combination of which allows employees – whether young or old – to increase wide information-gathering skills, to analyse diverse information sources, and to develop transferable professional skills, which are usable at other companies.

There is a general shift in Japan from company-directed vocational training to more worker-directed. The tasks of what to learn (e.g. basic or specialised skills or social skills), how to learn (e.g. on-the-job or off-the-job training or combination of the two) and when to learn (e.g. continuous or periodic) will be increasingly in the hands of individual workers. This change may favour older workers because they are able to find a wide range of self-training opportunities particularly for those who have extensive professional and social contacts. A learner-focused/directed strategy, which lifelong learning advocates, can become a useful tool to help individual older workers.

5.4.4. **Role of non-profit organisations**

The number of non-profit organisations is increasing rapidly in Japan. They consist of local citizens, the private sector and local community bodies promoting lifelong learning for older people (Yamada et al., 2003). Silver Human Resource Centre is a successful non-profit organisation and the government subsidises it substantially. It was created in 1980 and was expanded nationwide (currently with 350 000 registered members). The main purpose of this non-profit organisation is to offer contracts to older persons for services in areas such as cleaning, gardening, carpentry and clerical jobs. Older persons (60 %) who have participated in Silver Human Resource Centre activities reported that the main reason for participation is to maintain good health, one of the main objectives of lifelong learning in Japan (Naganawa, 1997). Society increasingly recognises non-profit organisations' flexible operations at grass-root level, their ability to attract a wide range of professional workers, including older volunteers, and their non-profit but robust resource mobilisation capacities.

5.5. Conclusions and future of lifelong learning for older workers

5.5.1. Developing older workers' self-efficacy in supportive learning environments

The acquisition of self-efficacy by older workers requires the will and effort to learn. It is critical for older workers to invest more time, energy and money in lifelong learning to improve their knowledge base for coping with all the critical factors affecting their present and future working environments. The following can contribute:

(a) knowledge of laws, regulations, policies, innovations, research findings on education/training, employment practices, employer-employee relations, working conditions, social security, retirement and investment practices, career counselling services, family life, Internet sites;

(b) ways to develop a comprehensive mid-life plan (around 40 years of age or earlier) from which a career plan is drawn up, taking into account one's present and future professional development needs and aspirations, personal and family life, financial needs, health and leisure;

(c) lifelong learning strategies to prepare oneself for flexible yet sustainable and transferable skills and certified qualifications and graduate level degrees in specific skill areas (IT, foreign languages, inter-cultural communication skills, etc.);

(d) skills related to sharing of child-rearing and housework by working husbands and wives;

(e) skills for sustaining sport and physical fitness and recreational activities.

The development of self-efficacy in all these skill development areas should be considered as an overall objective of lifelong learning for older workers.

Self-directed learning and the joint management of vocational training by public and private bodies are preferred by Japanese workers as lifelong learning strategies. This conclusion is consistent with the findings of an international survey conducted by the National Institute for Social Education, in which the Japanese senior citizens aged between 60 and 79 reported self-initiated learning opportunities (37 %) and a partnership approach by public and private bodies (26 %) as the most popular forms of learning (Ohsako, 1999). More interestingly, the results of the survey indicated that the choice of these two approaches by the seniors was positively correlated with their level of formal education.

Japan's lifelong employment system, in which employers provide employees with job-security and seniority-based promotions to reward them for their hard work, loyalty and attachment, is breaking down. Workers' self-efficacy development programmes and support services need to consider this changing employer-employee relationship and its psychological impact on workers and their work value orientation, particularly in dealing with redeployment and unemployment practices.

5.5.2. Employers as facilitators

It is important for employers to negotiate with older workers and their representative trade unions to establish lifelong learning-based (integrated) human resource development programmes to maximise productivity. As work quality is not achieved independently of worker satisfaction and psychological fulfilment, it is equally important to enhance the quality of life and motivation among employees in workplaces. It is, therefore, advisable for firms to conceive a broader lifelong learning-based training programme, by combining on-the-job and off-the-job training, covering both vocational skills and other factors which affect motivation and productivity. On-the-job training in Japan has traditionally been too firm-centred, and has tended to neglect the aspect of a self-initiated/directed dimension of career development. When moving from a seniority-based promotion and wage system to a competence- or qualification-based system, it is essential for employers to have a valid job specification system, placement and fair personnel evaluation mechanisms for determining wages and job performance. Employers should also make use of work-relevant experiences of older workers and place them in appropriate positions.

5.5.3. Strengthening legal and policy bases

Regulations are needed to support the joint delivery of lifelong learning by the education and the employment sectors. Employment/labour and social policy-making processes should fully consider the merits of adopting a lifelong learning approach to improve the employability of young and older workers. This claim is consistent with the Article 3.2.2 of the *Human resources development promotion law* (already in force in 1969), which was closely linked to the *School education law*. Public policies should equally support career development and job training programmes jointly conducted by older workers and their employers. Such policies should encourage employers to design lifelong learning-based education and training initiatives, taking into consideration workers' diverse mental and social needs, abilities

and the conditions of the learning environment. Training policies should reflect worker's voices, family life, and leisure needs. Such policies should also be responsive to diverse working environments, characterised by diverse employment characteristics (e.g. small business, self-employment, redeployment, contracted work) and work-styles (e.g. working at home, work-sharing, part-time work, volunteer work, etc.).

To achieve a prosperous, dynamic and yet caring and inclusive learning society, we all need to engage in lifelong learning to make informed and meaningful life and career plans and decisions. The need for lifelong learning is voiced widely in all spheres of society in Japan but the task to apply its concepts and principles for the benefit of older workers and national development has only just begun. It may not be an exaggeration to say that Japan's success in keeping older workers (45+) employed or engaged in socially active and economically productive activities, depends significantly on how wisely society captures and integrates lifelong learning strategies with current training and education policies and programmes.

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Views of older employees on work and learning

CHAPTER 6

Employees' conceptions of age, experience and competence

Susanna Paloniemi

Abstract

One of the issues affecting older workers in working life is how ageing is perceived to affect the work performance of an individual. This chapter examines employees' conceptions of the meaning of age and professional experience in their own words. Semistructured individual and group interviews were conducted in six small and medium sized enterprises during the spring of 1999 in central Finland. The results illustrate an ambivalence about age, while highlighting the positive meanings attributed to age and experience in competence development in working life. The dominant conceptions of age in the study were age neutral. Age, however, became meaningful in the light of gaining experience. The employees participating in the study assessed work experience as the main source of their professional competence. The individual-specific nature of ageing, together with the context-dependent nature of competence that emerged from the study, challenge workplaces to pay more attention to cooperation between workers of different ages for learning purposes.

6.1. Introduction

Changes in working life pose challenges for continuous learning and updating competence for workers of all ages. But, as the workforce is ageing, the competence of today's workers is questioned on grounds of age, even as early as at 45 years. Age discrimination in recruitment, in education and in other areas of working life (Walker, 1997; Kosonen, 2003) has raised the need for 'age aware' management and for new human resource development practices. There is a potential conflict between the value of the

experience of older workers and the age-related decline in their work abilities (Tikkanen, 1998).

Literature on attitudes to older workers is extensive but mostly focuses on the views of employers. In general, the results show ambivalence, with both positive and negative attitudes (Kujala, 1998). Positive attitudes towards older workers are characterised by references to 'a good work ethic' and personal maturity. Negative attitudes are related to cognitive resources, especially learning ability and the ability to cope with new technology. This ambivalence prevails in society at large, in work organisations, and among older workers themselves (Schrank and Waring, 1989). Many of the negative meanings attributed to age and ageing have their origins in medical perspectives on ageing (Kaeter, 1995) leading to the assumption that age-related decline affects our ability to perform in the workplace. Yet wisdom, which is seen to be a consequence of age and personal maturity (Sternberg, 1990), is valued. Research on employee views on age-related issues has been scarce, although interest has increased in recent years. According to this research, which has been based mostly on qualitative approaches, age is viewed as 'socially constructed' and reflecting the personal life history of an individual (Marin, 2001; Nikander, 2002; Kosonen, 2003; Julkunen, 2003).

This chapter is based on an empirical study which aimed to describe the meanings that employees give to age and experience in relation to their professional competence and its development in working life (Paloniemi, 2004). The chapter is divided into five sections. The first section describes the data and data analysis. The next three sections examine the research results on the meaning of age in relation to competence and its development, and on the relationship between age and experience. The chapter concludes with comments and a discussion.

6.2. Data and analysis

6.2.1. Data

The data on which this chapter is based was collected as part of a large EU research project entitled *Working life changes and training of older workers*, also known by the acronym Worktow (Tikkanen et al., 2002). In Spring 1999, semistructured interviews were conducted with employees (N=43) from six medium sized enterprises in central Finland. The age of the participants in the study ranged from 24 to 62 years (mean age 41). More

than half the interviewees were over 40 years of age.

Three of the participating companies represented the service sector: an (independent) bank, a pharmacy, and a nursery. The number of interviewees in these companies was 21; most of them were women (19 women and 2 men). In the bank the staff was older (33–57 years) female dominated, highly educated, and with long careers in the company. Extensive training had been provided for the staff during a company reorganisation. The staff in the pharmacy was more gender and age-balanced (30–55 years), had high education and the length of careers at the company varied. The staff participated regularly in new product-related training provided by the pharmacy chain headquarters. The employees at the nursery were younger (24–54 years), mostly females with low education and short careers. The staff had recently been provided with formal training programmes related to information and communication technology and client service.

The other three participating companies – two engineering companies and a wood production company – provided 22 interviewees, all of them white collar workers (information/knowledge workers). Most of these employees were men (17 men and 5 women). In engineering company A, the age of the staff varied (24–48 years), education level was high, and the length of careers varied. Opportunities for training were not good, except for the highest positions. The training provided was mostly carried out as on-the-job training by staff and suppliers/clients. The staff profile was similar to the engineering company B. The age range among the employees was between 27 and 62. This company had its own in-house trainer and cooperated with local training institutions, so training opportunities for staff were quite good. In the wood production company, the white collar employees who participated in the study were younger (26–51 years) and highly educated. There was also a good gender balance in this company. These employees considered their training possibilities poor, but management and staff in higher positions were more optimistic.

6.2.2. Interviews

Both group and individual interviews were used, the majority being group interviews (10 out of 16). The themes discussed in the interviews were job competence, learning and training, and the impact of age and work experience on job competence. The size of groups varied from two to six employees, and in each case there were at least two researchers present. The groups were natural groups in a sense that the employees in the groups worked together on a regular basis.

6.2.3. **Data analysis**

A phenomenographical approach was applied in the data analysis. Phenomenography is a qualitative research approach, which was developed by a group of researchers in education at the University of Göteborg in Sweden in the early 1970s. The aim of phenomenographical research is to describe qualitatively different ways of experiencing and understanding various phenomena around us (Marton, 1994).

The analysis tracked different conceptions of age and the meaning of experience. The purpose was to explore the range of qualitatively different ways the employees experienced, understood, and comprehended the meaning of age and experience in constructing and developing their competence in a working life context. A system of categories was established using contextual analysis and concentrating on the similarities and differences in employee conceptions. The aim was to bring out the variety in employee conceptions, even if they could not be regarded as 'correct' in the light of research-based knowledge. The conceptions that emerged in the interviews are understood to reflect both individual and shared conceptions about the phenomena studied.

6.3. Competence construction in working life

The meaning of competence is increasingly being discussed in working life. Competence and expertise are seen as the most valuable resources of individuals, organisations, and societies. However, it is not always clear how the term competence is understood and defined. Streumer and Bjorkquist (1998) conclude that while in British literature competence tends to refer to an individual's capability to perform a set of tasks, in German literature the concept is usually understood more broadly than knowledge and skills to include professional identity. The definition used in this chapter represents an understanding that is more common in the Nordic countries. In addition to knowledge and skills, attitudes and aptitudes are included in professional competence. In this definition of competence the emphasis is on metacognitive knowledge (e.g. learning to learn, awareness of one's strengths) alongside formal and practical knowledge (Eteläpelto, 1998). Recent studies on competence and expertise have highlighted the significance of work organisations in professional growth and the construction of professional identity (Eteläpelto and Collin, 2004). Expertise is understood not only as something possessed by an individual but also as

having a collective nature. In this chapter, professional competence is viewed as including both individual and collective dimensions which are understood to interact with each other in everyday practice. The process of professional identity construction is approached from the point of view of competence development.

During the interviews it became clear that describing one's competence as used or needed in the course of one's daily work was not an easy task. It was often the case that it was easier for interviewees to describe fellow workers' competence than their own. In tracing the conceptions of competence and its development, the following sub-themes were used in the interviews: content of competence; sources of competence; need for competence development; and ways of developing individual competence. Professional competence was something that could be understood from the point of view of both job demands and personal qualifications. This emerged from taking an interpreted approach to competence (Sandberg, 2000) which, unlike a rationalistic approach, underlines the importance of context.

The meaning of the work context in defining competence emerged clearly when the conceptions of employees from the two types of work sectors studied were analysed in parallel. Service sector employees emphasised client service skills and product knowledge over information and communication technology skills and the overall management of one's job. The last two, in contrast, were seen as the two most important areas of competence among the interviewees from the engineering and wood companies. Individuals construct their professional identity through the interaction between personal life histories and social contexts (Salling Olesen, 2001). Because of this, professional identity draws considerably from the life course of an individual. At the same time it is closely dependent on local contexts. The construction of professional identity can be described as individual-orientated, situational, sociocultural and lifelong.

The employees saw their professional competence as a dynamic, complex and continuous process. The development of one's competence was seen as an essential part of the overall competence required by the company. This became visible in the way that competence was discussed in the light of the need to update one's competence in working life in line with changes in the job and the working environment. In particular, changes in information and communication technology and its utilisation create a need for learning and development. However, this is despite the fact that, for most employees, information and communication technology is only a tool with which to perform one's job, and is not the content of the work itself.

For many adults the workplace is the most important learning environment offering opportunities for participation. The most frequent ways of developing professional competence reported by interviewees in the Worktow project as a whole were: competence sharing within the work organisation (work community); learning on-the-job (e.g. problem solving); participation in training; keeping up with professional literature and other sources of information; cooperation outside the work community; and using knowledge and skills learned in other life domains (Tikkanen, et al., 2002). These findings are similar to those from other studies focusing on learning at or through work (e.g. Eraut et al., 1998; Collin, 2002; Billett, 2004; Fuller and Unwin, 2004). Employees participating in the Worktow project emphasised learning at work, underlining social participation in work organisations as key elements for experience-based learning (see also Collin, 2005). Although the overall attitude towards training and education was positive and participation in training programmes during the previous three years was high (Tikkanen and Kujala, 2000) the employees preferred work-based ways to learn or develop their competence compared with formal training programmes.

6.4. Many meanings of age in relation to competence

Employee conceptions of age supported the results from previous studies which showed ambivalence about age and ageing in working life. Several conceptions of age were found in each interview. Descriptions of the meaning of age and ageing in competence can be classified as follows:
(a) the non-significance of age;
(b) age as the acquisition of experience;
(c) age in relation to working life today;
(d) age as impairing the ability to work.

Based on these categories, the basic attitudes to age and ageing could be broken down into three attitudes: age neutral, age positive and age negative. See Table 1 for illustrations of these three attitudes.

The dominant age conceptions by interviewees in the study were age neutral: age as such was not seen as significant in job competence and its development. Instead, personal characteristics such as the motivation to develop oneself, and various context and task-related factors were emphasised. Of course the non-significance of age can be understood as a

Table 1. **Employee age conceptions of competence and its development**

Basic attitude	Category	Central features	Examples of expressions
Age neutral	The non-significance of age	• emphasising personal characteristics and work tasks; • individuality in ageing process and in learning; • demand for learning concerns workers of all ages; • refusal to cite chronological age in defining older worker.	'[…] it is the person that counts. Personal characteristics are more important than age [...]' '[…] about age [...] age is not an obstacle to work – if your health is ok' '[…] I don't think that age matters if you are interested in what you are studying'.
Age positive	Age as the acquisition of experience	• the accumulation of experience through the life course; • personal growth and self-assurance in competence.	'[…] because you don't get experience without being at a certain age […]' '[…] when you get experience you learn self-assurance and you know what your competences are'.
	Age as a life stage where the emphasis is on competence development	• life course perspective; • pronounced meaning of work; • directing attention at essentials; • centrality of social age.	'[…] when you are older it is much easier to learn things [...] and you feel more interested than when you were younger [...]' 'You realise, that this is something that you should know [...] that is good for you'.
Age negative	Age in relation to the present time and working life today	• comparison of older and younger workers' competence.	'[…] youngsters are good at IT but in planning they don't necessarily have the knowledge'.

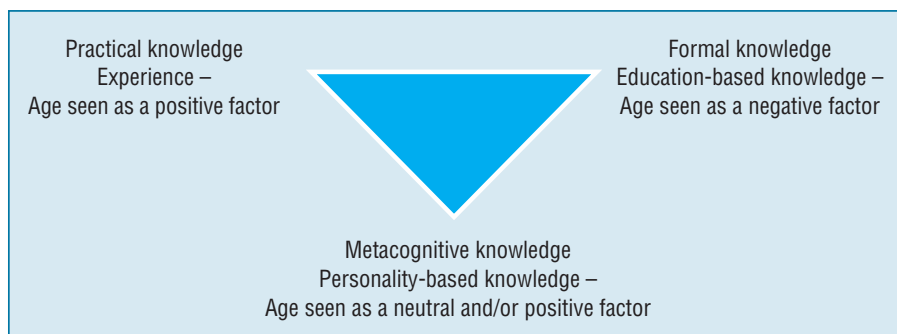| Basic attitude	Category	Central features	Examples of expressions
Age negative	Age as impairing work ability	• ageing as a biological process; • impairment in physical work ability.	'[...] then there are the physical limitations […] there are differences [between older and younger]'.
	Age as weakening competence development	• reduced ability to learn because of the ageing process.	'[...] it takes more time to learn new things [...] it's this memory thing'.
	Ageing as a life stage where competence development is reduced	• confrontation between work and retirement; • decreased motivation; • centrality of social age.	'[…] but when you get close to retirement age […] I'm not sure that you still are interested in developing yourself'.

strategy to deny one's chronological age. However, the arguments for discounting age emphasised the individual nature of ageing as well as the impact of competence and development on how one perceives one's age.

Age was also seen to have an impact as a positive correlate with the acquisition of (work) experience and personal growth. In this regard age and ageing with regard to (professional) competence and its development was viewed positively. Age became important in the light of gaining more experience. From a sociocultural perspective on the nature of competence (e.g. Billett, 2001) age can be viewed as one factor of personal growth, central to the process of competence construction. The acquisition of experience requires, at least to some extent, the accumulation of years. The Worktow project showed that employees regarded experience, seen as intrinsically related to one's age, as a basis for learning in the sense that experience is the source of professional competence (Tikkanen et al., 2002).

Although the overall picture of the meaning of age in relation to competence and its development in the Worktow project as a whole was positive, there was another side to the coin. In terms of physical ability, age was also seen to cause decline in professional competence. An impairment in speed and effectiveness in learning, and a decreased willingness to

develop one's competence as one grew older and started to look ahead to retirement, were also raised. The life stage perspective highlights the difference between workers from different age groups. While younger workers generally have the advantage of a higher level formal education, the strength of older workers lies in their experience-based competence. However, to share these qualitatively different kinds of competence and contribute to the production of new knowledge in work organisations, it is necessary to identify the 'real' competence required in everyday working life. By placing workers of different ages in juxtaposition, we underline the significance of age in relation to the 'real' competence required in working life. Thus we can make comparisons between the different competence-related strengths of older and younger workers.

Figure 1. **Relations between age and different kinds of knowledge**

Practical knowledge
Experience –
Age seen as a positive factor

Formal knowledge
Education-based knowledge –
Age seen as a negative factor

Metacognitive knowledge
Personality-based knowledge –
Age seen as a neutral and/or positive factor

Age conceptions relate to the different kinds of knowledge required in work (Figure 1 above). Knowledge about products, tools and specific types of work relate to the formal knowledge that is normally learned in vocational school. The significance of age for this kind of knowledge is important because of the difference in formal educational levels between generations. Age negative conceptions are easily held about older workers in the area of formal knowledge. However, positive conceptions are held in relation to the practical and metacognitive components of knowledge. Age is significant in gaining work experience and thus developing practical knowledge and competence and constructing one's professional identity in everyday practice. Although value is placed mostly on work experience, broader life experiences more are also important. Work experience based competence can be understood, at least partly, as tacit knowledge (Polanyi, 1966; Sternberg et al., 2000). However, although there seems to be a shared

understanding that tacit knowledge forms an essential part of professional identity, there has been little research on it. Much effort has gone into how to make tacit knowledge explicit (e.g. Nonaka and Takeuchi, 1995) but the nature and formation of tacit knowledge in work organisations and in working life practices has not been tackled.

6.5. The relationship between age and experience

Although the dominant view that emerged from the Worktow project was that professional competence is independent of age, age becomes significant through other factors. Here the most essential age conception to emerge was a positive one, linked to the accumulation of experience and personal growth. Actual or real competence was strongly influenced by learning from experience. Both the individual's personal life history and the work community impacted on this process of professional identity construction.

The role of experience is prominent, especially in the acquisition of job specific competence, knowledge related to the work organisation and knowledge that helps one to assess one's work and ways of acting. The employees participating in the study stated that work experience was the main source of their professional competence (Tikkanen and Kujala, 2000). The relative value of work experience as a source of overall job competence, in relation to formal training and personality related strengths, has been examined in more detail in an earlier study based on the same data used here (Tikkanen and Kujala, 2000). Interviewees were asked to assess the relative value of three sources of competence – formal training, experience, and personal characteristics – for their current level of job competence (indicated as 100 %). The results showed that job competence was assessed as mainly resulting from work experience (46 %). The contribution of personal characteristics was valued more highly (29 %) than formal training (25 %) even if all the formal training received during one's career was included. No statistically significant differences were found between the responses of older and younger workers or between three types of work that were examined, that is, manual, service and white collar (information/ knowledge) related production work. Experience was reported as having a positive impact with regard to understanding theoretical knowledge, and increasing and maintaining learning motivation.

A central feature of experience-dependent competence is its tacit dimension. The significance of tacit knowledge also came up in relation to the

different aspects of competence. Besides knowledge and knowledge based content (e.g. product management) other kinds of content that can be described as 'artistry' or as 'knowing-how' (e.g. overall job management) were often mentioned. The relationship between experience and tacit knowledge, however, has not been unquestioned. Sternberg (1999) points out that it is often incorrectly assumed that experience is tacit knowledge. Although long experience usually increases tacit knowledge, it is the quality rather than the amount of the experience that is more important. Another aspect of tacit knowledge is that, like explicit knowledge, it requires updating. Because it is situational, practical, subjective and context-dependent, it has to be modified if it is to be useful in new situations and contexts. Changes in working life set challenges for continuous competence development, not only in knowledge and skills, but more broadly for professional identity and the capacity for collective participation.

However, in all of those discussions a key question relates to the relationship between age and relevant experience (Warr, 1998). It would be naïve to assume that all experiences have positive consequences for competence development. The employees in the study listed the following kinds of experiences as positive: learning from success; learning from mistakes; challenging job tasks; new and different job tasks; and problem solving situations. This means that working life practices have a major impact on it. The central role of experience based competence calls for a broader perspective on older workers' professional competence development. Instead of concentrating merely on the technical aspects of competence (knowledge and skills), there is a need to include other aspects associated with the formation of professional identity.

6.6. Conclusions

This chapter has examined the significance of age and work experience in competence development. The results illustrate ambivalence about people's conception of age but, in general, highlight the positive impact of age and experience on competence.

Developing professional competence in working life was characterised by social, contextual and work based features. Formal training was seldom mentioned. Thus, the role of management about the provision of training did not feature strongly. On the contrary, it was individual motivation and actions that were seen as central. Previous research has concentrated mostly on

employers' attitudes to older workers, giving a minor place to the voice of the workers themselves. Compared to results from earlier studies on employer attitudes to older workers learning (Taylor and Walker, 1994) the perceptions of the older workers themselves in this study were more positive. Furthermore, age as such was not a central issue. Personal characteristics and work related factors were emphasised rather than age. Hence, the results do not support the stereotypical view of a decline in competence or in competence development with increasing age. Nevertheless, age was meaningful, in relation to discrepancies in competence between workers of different ages and educational backgrounds.

However, lifelong learning is not merely a question of work-based learning practices. Enabling older workers to participate in formal training programmes and putting more emphasis on organised 'competence sharing practices' is required. Innovative vocational training programmes form an important part of professional competence construction.

The many meanings of age and ageing for competence development exemplify post-modern conceptualisations of age (Nikander, 2002) through emphasising the flexibility in conceptions of age. The definition of an older worker is 'negotiated' in relation to one's work organisation and one's individual life course. The individual-specific nature of ageing and the context dependence of competence require work-based learning practices that pay more attention to joint endeavours between workers of different ages. Instead of placing workers of different ages in juxtaposition, a more fruitful approach would be to develop methods that promote organised competence-sharing inside work organisations and networks.

In this study, employee conceptions were recorded by means of a phenomenographical analysis. An interesting question that lies beyond the limits of this chapter is whether conceptions vary across age groups. Because age is always culturally negotiated and socially constructed (Marin, 2001; Nikander, 2002) one might assume that conceptions of the meaning of age in competence and its development would differ according to one's age. An issue that did not come up in the study concerns gender differences. This does not seem to play such a strong role in Finnish working life as it might in other European contexts. Another question for future research is how, and on what basis, age can be 'negotiated' in working life in relation to one's professional identity. To study this, it is necessary to analyse the meaning of age as a 'negotiable' phenomenon that is embedded in everyday practice instead of seeing it as a deterministic factor.

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CHAPTER 7
Work attitudes and values of older US public service employees

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Abstract

This chapter summarises US lifelong learning trends and practices, with a particular focus on public workers, providing a background to understanding how to retain employees and ease labour shortages in public service (Fredericksen, 2004). Fredericksen's research measures the relative importance attached to learning and ability to use one's competence at work (workplace knowledge utilisation) by older public servants in relation to other values. It further clarifies how workers' sense of being valued (workplace value satisfaction) influences their retirement plans. This chapter advances a set of guiding principles for policies on retiring mature and skilled workers in all sectors. These principles are based on 'workplace value satisfaction', as a condition of worker retention beyond pension eligibility.

Introductory comment

A dramatic culture change is necessary to thwart the projected crisis of an ageing workforce. Fortunately, the necessary resources are ready and waiting for a call to action in our workplaces. When a respected professor was asked why she chose to retire early from a profession where she successfully guided hundreds of learners to build regenerative communities, she shyly replied: 'No one asked me to stay. I didn't feel I or my work was of value any more'.

Five years later, she was recruited back. In her absence the value of her work and her lifelong learning was recognised. Her story represents the importance of valuing the contribution of older workers (workplace value satisfaction) if they are to be retained as community assets.

7.1. US labour shortages and knowledge/skill deficits

US labour shortages are rising with economic recovery and are expected to grow worse up to 2030, regardless of cyclical changes in the economy. Research regarding their values and retirement plans suggests that older workers could solve the projected labour shortage. As a matter of social and economic policy, these workers are well worth consideration, especially if engaged in lifelong learning.

Labour shortages in the 21st century begin with a worker shortfall related to demographic shifts and retirement trends. Quite simply, 78 million 'baby boomers' produced only 46 million children to replace themselves in the workplace, leaving a shortfall of 32 million even if all of them entered the workplace. Added to this worker shortfall are another 10 million newly created jobs expected by 2010 resulting from new economic interests (Trent, 2000). This indicates economic and social problems if all 'boomers' retire on reaching full pension eligibility ([26]). In most settings, 40 % or more of the current US workforce becomes eligible for full pension benefits between 2006 and 2030 with the largest share eligible to join the exodus between 2006 and 2010 (Minnesota Department for Human Services, 1998).

Labour shortages projected in the 1970s were felt in the economic recovery of the 1990s and continued in top growth areas reflecting both an ageing society and transition into the 'information economy'. According the Minnesota Department of Employment and Economic Development (2004) current areas of employment with severe shortages include health, social service, computer technology, and education. Most of the workers in these areas are public sector employees or work in organisations that rely heavily on public funds.

Labour projections of the 1970s induced extensive research in the 1980s on the economic impact of an ageing workforce (Mitchell, 1993). Research was focused on the consequences of early retirement seen in social security benefit increases to retirees, absence of revenues from the same retirees to support the social security system, and rising medical costs.

([26]) Full pension benefit is a pension offered by an employer and is beyond the US Social Security system. Pension eligibility is earned through job tenure and often based on the worker's age plus employment years (e.g. Minnesota government employees, hired before 1986, earn full pension benefits when their age plus years in public service equals 90). Reduced benefits may be collected prior to reaching full eligibility after five years of service (MSRS, 2002).

Compounding the negative impact of early retirements was the long-term impact of massive layoffs of older workers to accommodate budget reductions and a weak US economy during the 1980s (op. cit.). A quarter of a century later in 2005, many of these redundant workers have exhausted all savings and are the first to apply for state welfare programmes at an earlier age. Their social security benefits are not enough to cover even modest living expenses when coupled with their health care costs.

Today's public sector labour shortages are exacerbated by a negative image of public servants, conservative political agendas, and budget solutions involving layoffs and programme cuts. Compounding these recruitment and retention problems in public service are rising demands for individualised goods, services, and security with less manpower. Economic rewards tied to long-term employee commitment, as opposed to immediate and competitive wage satisfaction, mitigates the problem (Fredericksen, 2004).

Rising longevity and shifting economies in a global community also contribute to labour shortages (Kinsella and Velkoff, 2001). The resulting decline in available labour and associated revenues will negatively impact dependency ratios until all 76 million 'millennials' born between 1981 and 2005 are able to join the workforce in about 2030 (Lancaster and Stillman, 2002). However, increased numbers of workers are only a solution if they are appropriately skilled to meet the new demands of the economy.

Twenty-first century knowledge or skill deficits are equally disturbing because they magnify labour shortages. These deficits are linked to advances in the new information economy in several ways. First, basic training provided for today's older workers (45+ years) prepared them for an industrial economy, meaning they were positioned in vertically structured organisations focused on process instead of horizontally structured organisations focused on results. Second, budget deficit solutions mean employer sponsored training and education reductions. Perhaps this budget reduction is related to the current traditionalist generation managers, viewing education as something one gains independently, or the 'boomer' managers who believe sponsored training will prompt workers to leave for better opportunities. In contrast, later generations interpret training opportunities as reasons to stay with an employer and assume continuous learning as a way of life (Zemke et al., 2000). Third, early assessments of older workers' attitudes toward learning are influenced by their anticipation of uniform teaching methods and limited opportunities for them to practice newly acquired skills (Fredericksen, 2004). Older workers can and do learn well in

adult learning modes, especially when they are able to apply lessons immediately to real situations (Woodruff and Birren, 1983). However, adult modes and immediate application do not always follow.

Worker transitions into new economies demand continuous skill training. All workers must practice 'soft skills' including the ability to work with a more diverse workforce, in distant relationships, with respect, accountability, and a healthy balance between work and other responsibilities or activities in life. They must sharpen technical skills in maths, writing, reading, speaking, and listening with a digital age vocabulary. Workers must hone knowledge skills guiding them about where and how to obtain information, build on knowledge, select pertinent information, wisely use and disseminate information. Finally, social skills are suited to rapid changes found in information economies. This requires positive engagement in changing organisational structures, responsibility and roles by sector.

Though the skills named above are essential to workers of all ages, adoption varies by generation. The younger generations are most familiar and comfortable with knowledge and social skills owing to their training and life experience. In contrast, older generations are more adept at soft and technical skills but from a different time (Zemke et al., 2000).

7.2. Correction strategies

Broad based awareness of long-term labour shortages was recognised in the mid-1990s but was quickly dispelled in industries hit hardest by an economic downturn in 2001. A renewed awareness of the labour gap resurfaces again in 2005 as retirements increase and the US economy slowly gains strength. Fredericksen (2004) notes that common strategies to fill vacancies left by retirees and newly created positions include technological substitutes, recruitment from succeeding generations, imported labour, exported jobs, and redefining work in all sectors.

Federal legislation encourages lifelong learning supported scholarships and individual or corporate tax credits for employer sponsored education, under the *Taxpayer relief Act of 1997*. Income eligibility criteria allow up to 20 million students to receive scholarships or tax relief for post-secondary education acquired from accredited learning institutions (Kwan et al., 2004).

Interim measures used by those pressed for time, or believing the shortage to be temporary, include knowledge transfer strategies. Some State governments mirror private sector actions by implementing this strategy,

which includes various supportive actions to expedite transfer of critical information from retiring to new workers. The menu of actions includes job shadowing, communities of practice, and process documentation found in manuals. Other actions involve flow charts, critical incident interviews, questionnaire documents, technological expert systems, electronic performance support systems, and checklists or process steps. Individualised measures make use of story-boards, mentors, storytelling, best practice studies or meetings, and retirees on retainer (Council of State Governments, 2004).

US employers who recognise the long-term nature of labour shortages and/or immediate and continuous benefits of lifelong learning, sponsor knowledge or skill development. The *National household education survey* of 2001 reported 68 % of employed adults who participated in educational activities received employer support in the previous 12 months. Though the largest proportion of working adults are between 41 and 65 years of age, the proportion of participants in employer supported training declines with age. Education or training includes college or university degree programmes, work-related training, personal development, and 'English as a second language' courses. On a broader scale, education includes basic skill education, vocational or technical diplomas, and apprenticeship programmes.

Public sector jobs comprise at least 16.2 % of all jobs held by US workers, with the trend higher in sparsely populated areas. Since public sector human resource planning and management often reflect action in other sectors, it is useful to review their lifelong learning strategies. Three Government performance project (GPP, 2005) studies evaluated how well States manage public service employees based on retention factors, hiring practices, performance appraisal, planning, and training (Table 1). Centrally located States of the mid-west of the US scored slightly higher than coastal States. Unfortunately most States received mediocre scores for planning and/or training efforts with only six percent (6 %) considered strong on both counts. By 2001, 50 % of the States initiated workforce planning (Fredericksen, 2004). States' planning processes revealed important retention factors: career advancement tied to career training, career changes with training, and mentoring programmes.

States were motivated by projections of 30 % to 50 % of State staff qualifying for pensioned retirement by 2006, with two States at 65 % and 70 % of employees meeting pension criteria in particular executive agencies. Follow-up interviews in January 2002 revealed directors redrafting workforce

Table 1. **Percentage of State government activities graded for strength in 2004**

Performance factor	Strong	Mediocre	Weak
Workforce planning in progress	14	48	38
Workforce training in progress	20	62	18
Workforce planning and training	6	76	18

Source: GPP, 2005.

plans to coincide with an economic downturn, State budget deficits, and prescribed worker layoffs to balance budgets (Fredericksen, 2004). A comparison of Fredericksen's study and results from the Government performance project in 2005 show that those States reaching a crisis in workforce shortages by 2003 acted more decisively. Each State graded for strong planning and training recognises the importance of strategic and integrated workforce planning, including annual monitoring and attention to knowledge and skill assessments. Similarly, each of these States has authority and a budget to support recommendations coming out of annual workforce progress reviews.

Correction strategies succeed when broadly communicated and supported, regardless of employment sector. Worker participation in planning is growing. Learning participation increased from 40 % of workers in 1995 to 46 % in 2001, or 92 million adults. The highest participation rates are among persons 31 to 50 years of age. They are most often women, more educated persons, single as opposed to married, and professional or managerial occupations as opposed to non-professional. Those with household incomes over USD 50 000 and the employed participate in education in greater proportion. Finally, people from other ethnic backgrounds participate in greater proportions than black, or Hispanic (Kwan et al., 2004).

American workers participate in work-related adult education and lifelong learning for various reasons: over half (68 %) receive employer support, including reimbursement of tuition, fees, and other expenses (e.g. reimbursement of associated course costs or course work during paid work hours). Nearly all workforce learners (95 %) participate in maintaining or improving skills or knowledge and most (84 %) participate in learning new skills or methods. 62 % of learners are required to participate by their employer, to retain professional certification or satisfy legal requirements (ibid.).

Work-related informal learning attracts 125 million adults and is considered a major source of workplace knowledge and skill development. It is gained through supervised training or mentoring or self-paced study using manuals, videos, or a computer or informal presentations, conferences or reading professional literature.

US business, industry, and government are major providers of work-related learning. Increasingly they use automated technology from college or university degree programmes, work-related courses, and personal interest courses (ibid.). An examination of an inventory of State government websites on 31 January 2005 (by the author) indicated that 32 States offer online training to all government employees. Seven States offer training only for managers and supervisors. Ten States offer continuous quality improvement programmes for all employees and one State labels the education programme a 'blueprint for lifelong learning'.

The blueprint for lifelong learning in the State of Ohio offers individual learning accounts and has learning coordinators similar to lifelong learning programmes sponsored by the Canadian government and some private sector employers, operated by union representatives (Murray, 2001).

Closer examination of workforce planning and training in Minnesota State government provides background data for interpreting what older workers expressed in a 2002 survey (Fredericksen, 2004). State employee education and training declined through the 1990s (GPP, 2001). Governor Ventura's administration developed a sophisticated, integrated workforce plan including annual knowledge or skill assessments of State employees and a training component to address the deficit in 2000 (DOER, 2000). This plan was replaced with The Pawlenty-Molnau 'drive to excellence plan' to balance the State budget (Department of Administration, 2004) under the Pawlenty administration. The plan is focused less on human resource development and more on human resource replacement with technology. Minnesota is criticised by Government performance project (GPP, 2005) for low expenditure on employee training and development, along with low levels of employee career development plans. Concentrated training efforts under Pawlenty's administration are focused on front-line supervisors and senior managers. The Government performance project criticises Minnesota for the absence of skill and competence pay and low levels of employee performance reviews. So, while workforce planning is strong, the training plans are weak. This places Minnesota at risk for quality service and low workforce retention as the economy recovers and more than 40 % of its State employees become eligible for retirement by 2010.

7.3. A survey on older workers in Minnesota

7.3.1. Introduction

The rest of this chapter presents the results of a survey (Fredericksen, 2004), which investigated how a projected labour shortage in Minnesota State service might be offset by the retention of older workers. Older workers participating in this study reflected the impact of demographic shifts in an ageing but increasingly diverse population, a changing economic base, and new organisational structures. All this happened against a backdrop of economic highs interrupted by a dramatic economic downturn. Recent experiences were punctuated by terrorist attacks within the US, a growing cognisance of gaps between those above and at poverty levels (Table 2). Families felt the effects of shifting alliances and stereotyped expectations of older citizens regarding retirement. Minnesota State employees survived difficult labour negotiations including a State-wide strike in 2001, antiquated management practices, and legislative delays in contract approvals, on top of employment pressures noted earlier in the public service (GPP, 2005; Fredericksen, 2004).

Table 2. **Maximum income per household to qualify for welfare assistance based on income at the poverty level**

Size of family unit	48 contiguous States and D.C. ($)	Alaska ($)	Hawaii ($)
1	9 310	11 630	10 700
2	12 490	15 610	14 360
3	15 670	19 590	18 020
4	18 850	23 570	21 680
5	22 030	27 550	25 340
6	25 210	31 530	29 000
7	28 390	35 510	32 660
8	31 570	39 490	36 320
For each additional person, add	3 180	3 980	3 66

Source: Department of health and human service (2004).

In the survey, Minnesota State employees indicated which values are most important to them, whether or not they are satisfied in their jobs, and where satisfaction could be improved. Additionally, they indicated whether they will delay retirement beyond pension eligibility, when they plan to retire or leave State service, why they retire or leave State service, and 'workplace value satisfaction' factors that would lead to delayed retirement.

The survey results clarify whether older workers will follow retirement trends recorded with the DOER and the Minnesota State Retirement System (MSRS) both of which project 47 % of all workers will retire by 2016 (DOER, 2001 and MSRS, 2002). Similarly, it considers whether State workers will follow general population trends where 50-80 % of 'boomers' will delay retirement for economic reasons (Roper Starch Worldwide, 2000; Gambone, 2000; Wirtz, 1998).

7.3.2. Description of the survey

The survey (Fredericksen, 2004) was targeted at older Minnesota State employees and was carried out in autumn 2002. A total of 1 462 satisfaction surveys were returned out of 2 531 delivered by US postal service. Minnesota employed 53 000 State staff in 2002. Participants were enrolled in State sponsored retirement planning sessions between 1997 and 2002. Survey participation was voluntary.

Using a Likert scale, participants ranked the importance of 11 values typically revered by older adults: economic security, economic reward, ability utilisation, authority, autonomy, personal development, self-actualisation, altruism, community belonging, social interaction and control of physical working conditions (Yates, 1985). The scale used was: 1 = of little or no importance; 2 = somewhat important; 3 = important; and 4 = very important. Employees indicated which values were satisfied through their work and how unsatisfied values could be better satisfied. Participants supplied their dates of full pension eligibility, preferred retirement, and planned retirement. Basic demographic information and whether they would consider delayed retirement in return for 'workplace value satisfaction' was indicated. Finally, employees answered two open-ended questions regarding their retirement planning rationale and made other comments on State employment and retirement. Answers to open-ended questions were coded by the 11 values noted above.

Using the statistical programme SPSS, relationships were analysed and reported at a 95 % level of confidence. Internal validity was established using a test-retest strategy and triangulation of responses from three

sections of the survey instrument. Proportionate participation of all 25 executive government agencies from all geographic parts of Minnesota resulted in credible information (for more details on the methodology in the study and on the statistics shown here, see Fredericksen, 2004).

7.4. Results of the survey

The Minnesota study is unique because it measures value satisfaction with public sector sensitivity, analyses results by age group, records voices of US workers, and measures retirement commitments under unusual historic circumstances. The results are discussed below.

7.4.1. Important values for older public service workers

'Economic security' received the highest ranking of 4, or very important, by 54.8 % of survey participants. Open-ended answers defined economic security as covering the cost of routine living expenses and rising health care costs. Influences include limited socialised medicine available in the US under Medicare and tied to social security eligibility at 65+ years of age. The expression of one employee reflects the comments of many workers:

> 'I'd like to retire when I'm eligible but we just can't afford to do it with our health care premiums going up every year. It would cost us somewhere between USD 900 and USD 1 200 each month and we just don't have it. We have very little saved [and] really need the income to get by.' (participant # 158).

'Personal development', defined as informal learning, received a ranking between 3 and 4, more than important but less than very important, by 78 % of the survey participants. This ranked highest among employees in human services, health, education, and justice. Women more often score personal development higher than men, as did workers under 45 years old or 63+ years old. Those giving it the highest score generally have less than 11 years of experience in their job class and become pension eligible by 2010.

Participants in this survey are well-educated employees compared to members of their age cohort in the general public. Not surprisingly, 67.3 % of State employees rank 'ability utilisation' at 3, as an important value to be satisfied. 'Ability utilisation' is defined as continuous formal development of knowledge and skills in the workplace that can be used in the workplace. Like personal development, ability utilisation scores highest among youngest and oldest employees, women as opposed to men, and those with fewer than 11

years of experience in their job class. Unlike the relationship between personal development scores and years in public service, ability utilisation scores higher with employees holding under 20 years of public service experience. Finally, ability utilisation is more important to workers who have a long time to go before becoming pension eligible.

7.4.2. Are top values satisfied?

Most (80 %) older workers indicate that 'ability utilisation' is satisfied through public service. Appreciation for workplace learning is reflected by a 25-year veteran of public service:

> 'Life is getting shorter all the time and we've gotta learn all we can just to keep up with our kids, neighbours, and the daily decisions we have to make. I've had a great experience learning about the world and my job in State service. I'd really miss it if I retired now' (Fredericksen, 2004, participant # 126).

Fewer older workers (68.1 %) indicate that economic security is satisfied. This statement indicates that some workers equate employer paid education with economic security,

> 'Unless some changes are made here, I've gotta go where the benefits are more competitive. I need the chance to make more money and keep up with the changes. My friends in private industry just take it all for granted. I like the people I work with and my job but they pay for your education on the outside (private industry) and offer more money besides' (op.cit., participant # 86).

Nearly half (49.1 %) find personal development satisfaction in public service. It is alarming to discover over half do not. Satisfaction of this value had nothing to do with longevity of public service, job classification as a manager, human resource director or line staff, or the employee's level of education.

7.4.3. How to improve value satisfaction

Changes in State employment policy or practice would improve workplace value satisfaction according to 42.24 % of older Minnesota public workers. These comments by older Minnesota workers are representative of the views of many of their colleagues:

> 'Odd as it seems, some parts of "the good old days" weren't so bad. Not that I want to go back to all those parts, but I feel like I did a better job when I got regular chances to meet folks from other States working on the same problems with new ideas […] State sponsored training disappeared about 10 years ago

[…] Also, years ago we got together with our colleagues to discuss issues and come up with solutions. That rarely happens any more unless you're a manager or supervisor. What we need is policy and practices that give us the time and resources to get information and ideas we need […] to do our jobs and authority to use it in a timely manner. I like what I'm doing but if I had training like my friends on the outside (private industry), I could do a better job and feel better about the job I'm doing' (op. cit., participant # 1302).

'Well, I don't really want to retire now but I'm afraid if I stay much longer my reports will show how weak I am in "techno savvy" and I'll be too embarrassed to work with them. I just don't have the time or the privacy [for learning] to catch up any more' (op. cit., participant # 4).

Workers from economic development agencies, line staff planning to retire before or when they became pension eligible, and the youngest and oldest employees noted most often that a change in policy or practice would solve workplace value satisfaction problems. Women, more educated employees, and those with less experience selected this option more often than men or more experienced workers.

About 20 % of the older workers indicate satisfaction can be improved through self-employment, volunteer service or private sector employment. Those selecting self-employment for greater workplace value satisfaction are most often 46 to 55 year olds, holding job classifications where specific skills are among high demand occupations known for extreme labour shortages (e.g. medical, construction trades, systems analysts, etc.). They are often midway into their career experience. More women than men select volunteer activity for greater value satisfaction above paid State employment.

7.4.4. **Reasons for delaying retirement**

Older Minnesota public workers indicate they would delay retirement beyond full pension eligibility in return for workplace value satisfaction. While 32.7 % would prefer to retire after reaching eligibility, 56.6 % plan to retire after reaching eligibility, and nearly everyone (96.5 %) would delay retirement after reaching eligibility in return for greater workplace value satisfaction in public service.

Of Minnesota's older public service workers, 20 % would be tempted to delay retirement to improve economic security. Others (12.9 %) would be tempted to delay retirement for ability utilisation, that is, to gain workplace lifelong learning and apply it to their work and life in general. Far fewer

(4.2 %) are confident that the value of personal development could be satisfied in the workplace.

7.4.5. **Staying beyond pension eligibility**

Workers planning to delay retirement regardless of value satisfaction are 46+ year olds, have under 14 years of education, and have been in public service over 10 years. The US Department of Labour estimates that these workers will be among 2.3 million economically disadvantaged persons, eligible for public employment assistance programmes in the near future. Where relationships exist between value satisfaction and delayed retirement there is a higher proportion among managers and HR directors than line staff. Finally, higher proportions are found in transportation and economic development than other executive agencies.

Minnesota's older State workers prefer early retirement but would be tempted to work beyond pension eligibility to satisfy income needs or lifelong learning desires. They believe satisfaction of unmet needs is possible with changes in employment policy or practice. Just over half of Minnesota's older State employees must work to satisfy their need for income and this group is the least prepared for State service. They have less education, generally offer an intermittent work history, are females who traditionally supply family care for multiple generations, and have been in State service over 10 years. The US Department of Labour indicates that these Minnesota workers are among those with declining health and experiencing the impact of age stereotyping. This group recognises their desperate need for intensive training to elevate their skills to match more experienced and educated cohort members. All employees recognise their need for lifelong learning to match more sophisticated and changing workplace demands. To this end, managers must possess leadership skills necessary to facilitate culture change associated with information economies, horizontally structured organisations, and multi-generation or ethnically diverse workforces. Without these components, tension rises and performance drops, along with morale.

7.5. Conclusions

US national indicators project an economic crisis related to retirement trends and diminished employer-sponsored learning from the 1990s onward. The crisis is compounded by skilled labour shortages associated with demographic shifts, cultural expectations regarding US retirements, and an emerging information economy requiring a new combination of skill sets.

The importance of workplace lifelong learning for all age groups is recognised in public and private sector workforce planning. Older workers demonstrate a clear interest in workplace lifelong learning if they are assured of 'ability utilisation'. Despite age discrimination laws (Strasser, 1998) the relative proportion of US workers enrolled in employer sponsored learning drops with age. It must be recognised that older adults desire to learn, and are able to learn well, when maturity is recognised and incorporated in teaching methods.

Expedition of workplace lifelong learning will be accomplished most efficiently by listening to older workers themselves. They are tempted to delay retirement for satisfaction of lifelong learning values. Clear preferences of older Minnesota public workers are made regarding the following workplace values: economic security, ability utilisation, and personal development. It is reasonable to assume the results of Fredericksen's (2004) research are representative of public employees at all government levels in all States. Similar work environments found in non-profit employment indicate perspectives on workplace value satisfaction would follow those of the public sector. Though private sector employees tend to be less tolerant of public employment environments, it is likely their opinions on workplace value satisfaction are similar to those expressed by public employees since the social composition of each group is similar.

Older workers could offset labour shortages given their number, need for income, and willingness to delay retirement in exchange for workplace value satisfaction regarding economic security, ability utilisation, and, to a lesser extent, personal development. Finally, rising dependency ratios could be neutralised through workplace lifelong learning and delayed retirement resulting in a healthy, skilled, and more flexible workforce equipped to transfer lifelong learning benefits into their daily lives in the workplace and outside it.

7.6. Guiding principles on lifelong learning and older workers

According to US public service workers, workplace value satisfaction has an impact on delaying or at least influencing their retirement (Fredericksen, 2004). Based on their definitions of workplace value satisfaction, skills required in the emerging information economy, and opportunities for workplace lifelong learning, the following principles are put forward to promote retention policies for mature and skilled workers in all sectors:

(a) provide economic security with wages and lifelong learning aligned with performance;
(b) promote wellness and full health coverage for part or full time employment;
(c) award performance and lifelong learning accomplishments with trust, responsibility, and/or rewards of individualised personal development including travel;
(d) replace micro-management with lifelong learning competence and shared authority;
(e) encourage lifelong learning to support flexible environments;
(f) encourage lifelong learning in diverse settings with respect for preferred modes/pace;
(g) support lifelong learning tracks for HR directors and managers toward horizontal management structures, information economies, remote facilitation, and inter-generational respect;
(h) support lifelong learning career change/development tracks for all employees;

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CHAPTER 8

Company policies to integrate older male workers in Denmark

Leif Emil Hansen and Tom Nielsen

Abstract

Technological development and demands for increased efficiency in the workplace have drastic consequences for many older workers. Older unskilled workers in routine and often physically demanding jobs find it hard to keep abreast of developments. They are one of the most exposed groups when jobs are on the line. Extra efforts are needed to motivate this group to volunteer for in-service training and job rotation. This chapter draws on a research project carried out by Roskilde University, Denmark and funded by the EU Social Fund and Danish labour authorities. The focus of the research was on changes in the labour market affecting older workers. The project used a bottom-up approach, the idea being to let the voice of the older workers come forward. The chapter concludes with suggestions on ways to bring forward the voice of older workers and formulate policies based on their expressed needs.

8.1. Background

In 2003, the Department of Educational Studies at Roskilde University, Denmark, undertook a project entitled *Older workers in focus*. It was an EU Social Fund project carried out in cooperation with several trade unions and two companies in Denmark. The rationale for the project was that developments in the labour market lead to situations in which older workers are laid off and find it difficult to return to the labour market. For unskilled workers (that is, people without vocational qualifications and with only seven to eight years of schooling) technological advances and increased demands for efficiency cause their routine or manual work-tasks to be replaced by automated systems. Older unskilled workers in routine, and often physically demanding jobs, are one of the most exposed groups when jobs are under

threat. Furthermore, it is difficult to motivate this group to volunteer for in-service training or job rotation to renew their competence. Labour-market initiatives to promote training and employment among unskilled workers over 50 (and male workers in particular) are needed.

This research project was a continuation of the research work done during the last 10-15 years at the Department of Educational Studies, Roskilde University with support from the Danish Ministries of Education and Labour and often undertaken in cooperation with trade unions and adult education and training institutions.

8.2. Aim and target group

The overall aim of the *Older workers in focus* project was to identify methods and models for increasing the proportion of unskilled men, aged over 50 years, in employment.

The project featured Renoflex-Gruppen (a refuse collection company) and DSB S-tog (a company undertaking cleaning on the Danish State railways) based in Copenhagen. Both companies employ many low-skilled older workers. The management of these two companies cooperated with the elected representatives of the trade unions in developing corporate social responsibility policies. Both companies faced major structural changes during the last 10 years related to privatisation and new forms of work organisation. The refuse collection company was formerly run by the municipality, but is now private. DSB S-tog is a commercially oriented company, owned by the Danish State. These organisations constantly face challenges regarding efficiency, productivity and competition. The target group of the project was unskilled men.

8.3. Research methodology

The project was implemented in four phases:
(a) preliminary general research;
(b) a questionnaire and interview based on surveys;
(c) a future scenario seminar;
(d) issuing of recommendations concerning policies for older workers.

A bottom-up research approach, using qualitative methods to enable the voice of the older workers be heard, was used.

8.3.1. **General research**

In the first phase of the project a general literature review of existing research in Denmark was undertaken. The main findings were as follows:

(a) many of the older workers now actively employed will retire in the next few years leading to a future lack of qualified labour;

(b) younger workers are valued more highly than older workers when it comes to knowledge of new technology. In contrast, older workers are thought to possess advantages when it is a question of 'soft' qualifications. Also, they are absent less through illness.

8.3.2. **Questionnaire and interview survey phases**

The aim of the survey was to gain a picture of the two companies and their employees and to uncover opportunities and barriers regarding the upgrading and retaining of unskilled male employees over 50 years of age. The overall purpose was to form a basis for developing concrete methods and models for an active policy towards older workers.

The design of the questionnaire was based on the literature study and findings from previous related studies (Hansen et al., 1998). Additional inspiration was provided by the views of older workers on the work environment legislation. The background information gathered covered age, gender, position and years with the company. The research themes covered were the workers' notions of a good workplace and work life, including work conditions, work environment and social life in the workplace. Other themes covered were the respondents' views on their qualifications or lack of them, their plans for retirement and their ideas about a proper company policy for older workers.

The questionnaire was delivered to all 206 workers in Renoflex-Gruppen and DSB S-tog. The response rate was 42 % with respondents equally spread between the two companies. The age profile for the respondents was: 5 % under 30 years of age; 17 % aged 31-39 years; 22 % aged 40-44 years; 12 % aged 45-49 years; 29 % aged 50-54 years; 9 % aged 55-59 years; and 3 % over 60 years of age. This means that 89 % of the respondents were between 31 and 59 years of age.

The questionnaire survey was followed by interviews. The aim of these interviews was to focus on specific issues that had emerged as a result of the questionnaire survey and to gather concrete proposals for designing and implementing a policy for older workers. The interview guide was prepared on the basis of the questionnaire survey. The number of interviews carried out was 19 with a total of 30 participants. Of these 19 interviews, 14 were

undertaken with representatives of management, shop stewards and participants from trade union organisations, and there were five group interviews with older workers from the two companies.

Future scenario seminar phase

After the questionnaire survey and the interviews, a one-day 'future scenario seminar' was held with the following mentors who were to assist in implementing a policy for older workers; older workers themselves; shop stewards; management representatives; trade union representatives. There were 20 participants in total. The aim of the seminar was to give all those involved a chance to discuss opportunities for, and barriers to, upgrading and retaining unskilled men over 50 years of age. This provided all those involved with the possibility to influence the formulation of a policy for older workers.

The seminar was organised as a typical future workshop (for future scenario workshop models, see Jungk and Müllert, 1991) with an introductory phase consisting of two presentations, one about the potential of older workers policy from a trade union representative, and one about barriers by a management representative. For the criticism and vision phases, spontaneous key words from the participants were written on a flipchart. In the action phase, the idea was to produce realistic action plans. Finally, the results of these sessions were presented in a plenary session.

8.4. Findings

As the sample size in the empirical study was small and the response rate of 42 % was rather low, it does not make sense to make comparisons across the two companies, with regard to age groups and length of service, etc. However, bearing these limitations in mind, some general findings can be presented. The questionnaire survey and interviews provide the following picture of male workers in the 31-59 age bracket with 3–20 years of work experience:

(a) a good work environment (80 %), job security (80 %) and control over the planning of one's own work (74 %) played an important part in the workers' decision to apply for a job;

(b) a meaningful job means: good colleagues/good solidarity at the workplace (91 %), and a good physical work environment (84 %);

(c) 72 % of the employees felt that their present job satisfies their requirements for a meaningful job 'to a great extent' or 'to some extent';

(d) 80-85 % of the employees felt that older workers are a stable element in the workforce, display 'human maturity' and have sufficient qualifications. All those taking part in the interview survey were positive in their description of older workers;

(e) 89 % of the employees felt that there is a need for a policy towards older workers 'to a great extent' or 'to some extent'. Most employees under 30 years of age, however, answered 'to some extent' or 'not at all';

(f) management representatives seemed to be more cautious regarding a policy for older workers than employees, shop stewards and trade union representatives;

(g) most of the employees agree that pressures of time/stress (84 %), uncertain future/lack of job security (67 %), outsourcing of various functions (67 %) and lack of information about the development/state of the company, contribute to mental attrition and lower the quality of the psychological and emotional aspects of the work environment;

(h) the work environment was considered important by all those interviewed. The assessment, however, depended on the position of the interviewees. For example, several management representatives spoke in favour of a 'work smarter and harder' strategy, while shop stewards and trade union representatives spoke about 'working smarter and not harder';

(i) an active policy for older workers must take into account the lack of motivation felt by older workers when it comes to in-service training. This can be overcome by offering training, based on workers' own articulated needs and wishes, that takes place in a familiar learning environment (Hansen et al., 1998).

During the criticism phase of the future scenario seminar it became clear that the most significant barriers to a good working life for older workers in DSB S-tog and Renoflex-Gruppen were:

(a) a lack of trust among the various parties;

(b) the fear of being typecast as an older worker;

(c) the fact that these former public sector employees now have to compete on a full equal footing with private companies.

During the vision phase of the future scenario seminar the most important points made were that an active policy towards older workers should:

(a) give older workers influence on work organisation;

(b) provide job security;

(c) promote accordance between recruitment policies and general policies towards older workers;

(d) pay respect to employee work experience in the companies;

(e) promote cooperation with trade unions concerning company framework agreements.

8.5. Concluding points and recommendations

This study shows that it is possible to identify models to maintain and integrate older workers by means of bottom-up approaches. This means addressing the following issues:

(a) differences in viewpoints of social partners: although there is a tradition in Denmark for cooperation between the social partners in companies and society, there are clear differences among them concerning older workers;

(b) lack of trust among workers: this is based on the introduction of company efficiency and rationalisation strategies;

(c) a general feeling of insecurity among the workers regarding the extent to which politicians and company management offer support for older workers strategies: this is often seen to be merely verbal;

(d) the general structural changes of companies with regard to privatisation, competition and technological development favour younger workers over older workers;

(e) younger colleagues are less concerned about the need for an older workers policy.

These points are in general accordance with the results of other related studies, requiring a specific and focused effort to create forms of work change, qualification building and flexibility that are in accordance with the needs and wishes of low skilled, mature, male workers. Successful policies towards older workers must be based on the voice of the older senior workers themselves.

The following recommendations on the development of positive policies for older workers are derived from the above analysis:

(a) management need to clarify their intentions from the start;

(b) optimum internal information must be available for all;

(c) there must be support from all players at all levels in the company: employees, shop stewards, top management, middle management, and trade union representatives, etc.;

(d) information meetings for employees should be held in the workplace, to ensure a large turn-out;

(e) arranging a future scenario seminar early in the process is recommended, to give democratic anchorage to policy-making;

(f) when implementing educational programmes, attention ought to be paid to the fact that older workers have a low level of motivation for education and that time should be set aside for talking about this;

(g) the aim of an older workers policy should be both to recruit new older workers and to retain those already in the company;

(h) formulating a policy ought to be practice-oriented with usable, action-oriented statements and not just general declarations of intent;

(i) both the company's and the older workers' wishes and requirements must to be taken into account;

(j) real dialogue ought to commence when employees are about 50 years of age. This should entail discussion on the company's expectations of those employees who have been 10-20 years in the company. Colleagues of the employees should take part in this dialogue;

(k) all parties should accept that it takes time to develop a policy for older workers. A thorough and comprehensive plan is necessary to achieve a result to the satisfaction of everybody: the company and the older workers themselves.

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Personal reflections
of older learners

CHAPTER 9

Taking a higher education degree as a mature student – a personal story

Titane Delaey

Abstract

This chapter gives an account of the author's personal experiences of taking a distance-based higher university degree as a mature student. A contrast is made between the author's experiences of learning and studying at university as a young person and as a mature adult who is also a wife and mother. While the author's motivation for studying was far stronger as an adult, she experienced the ethos of the educational environment to be oriented to young people. The problems in gaining benefits in the labour market for a university degree taken in later life are also discussed. Employers tend to value a qualified young person over an older person who has a recently acquired additional qualification as well as years of experience.

9.1. Introduction

As a person over 45 years of age, I was amused to find out I now belong to the interesting category of 'older workers'. I have also, seemingly, embraced lifelong learning before it became fashionable. This is an account of my personal learning experience, both as a young and 'older' learner.

I went to university in Belgium for my first degree in 1976 as a full-time young student, to graduate in botany four years later. Annoyed with my low computer literacy skills, I took up studies again in 1985 on the premise that if you cannot beat them (IT people) then why not join them. This was an evening and Saturday morning course for about 18 months. In 2001, I took up university studies again, this time as a distance learner. In 2004, after four years of studies, I completed an MBA in the UK as a mature student and within the criteria of an 'older worker'.

It is interesting to look at the different sets of learning, to analyse what similarities or differences could be drawn between learning as a youngster and then later on in life. This chapter describes why I took up studies again in later life, what I wanted to study and how I went about it. Throughout, I have compared these reflections with any memories of how I remember acting 'the first time around'. I have also analysed perceived strengths discovered and difficulties encountered when studying as an older person, and how I dealt with the latter on a daily basis.

An obvious general premise was that memories of the first studies would probably be hazy at best. By focusing mainly on the recent issues as an older student, the less reliable memories could be relegated to provide a framework for comparison.

It was fascinating to seek to identify the strengths and weaknesses of learning as an older person. I discovered greater focus, motivation, commitment, awareness, patience and enthusiasm as particular strengths in this mature learning. Doing my own research, and taking responsibility, consciously, for any choices, was also new to me. I had serious intellectual concerns (was I still up to this?) and reservations about how to deal with practical obstacles, and was reassured to discover solutions to deal with them. I tried to find as many crutches as possible to help me learn.

9.2. More motivated, critical and in charge as an older student

Learning as an older student was a much more focused experience for me than when I was younger. Studying was a conscious choice which I felt more in control of than the aimless drifting I remember as a teenager. I felt I had lacked any focus as a youngster. I never questioned going to university, as it seemed a natural continuation from school. Studying was the only thing I had been trained to do. I remember having difficulty determining what to study, and ended up a scientist as both my parents before me. Learning later on in life seemed more a case of making everything count: the choice of subject, study time, exam preparation, the final dissertation. Time, in particular, now seemed to count. As Charles Handy states, I found out that 'life is not a dress-rehearsal'. It had been when studying the first time.

Motivation was certainly different. The main reasons for studying were personal development, with maintaining employability a distant second. I

wanted to pull together my life experiences and complement the practice with theory. Quality of life and the enjoyment from the development was important, and the use of new skills appealed. A new feeling was that I wanted to take pride in my new skills and did not take them for granted, as I would probably have done in the past. Everything seems a bigger deal when you are older.

9.3. More committed, enthusiastic and seeing the big picture

Commitment had been a difficult issue for me as a teenager, but it was definitely a strength in later life. It seemed natural to commit to studying and producing assignments for the MBA, as the big picture was always in the back of my mind. I knew why I wanted to study and I had made a conscious choice to do so. As a young person, being at university was just the normal thing to do at my age.

The raising of awareness also seems to be a particular blessing later in life. Even though daily existence was more complex – balancing a full-time job, a young family and studying – I felt more able to prioritise and see where the different phases were heading. It helped that I saw my studies could have practical applications. I remember how, for my first degree, I enjoyed dissecting plant life and producing faithful drawings of what I saw under microscopes, but I would have found it difficult to give reasons why I was doing these things. During the MBA, I would consciously relate subject matter to reality, and had many 'Aha!-moments' where I could make links between different subjects. As a young student, each subject was an oasis, totally separate from any other. Learning as an older student, I would enjoy looking for links between different subjects and seeing how world economics, for example, could influence human resource policies in my own organisation. The result was that I would find myself answering exam questions on personnel issues with bits of information from an economics or finance course, or even project management.

Enthusiasm was also a bonus for the later studies: I felt more involved with the subject matter. I was also able to weave the new information into an existing knowledge base, which brought about the impression of filling in gaps; this was a little like finding and slotting in pieces of a puzzle. Every time a new piece was assimilated, the whole picture became a little clearer. This maintained my enthusiasm at a high level throughout the studies. I do not

remember anything similar having happened earlier when the only certain enthusiasm was a love for dancing and hanging out with friends, especially boys.

9.4. The process is as important as the goal

Patience was a welcome surprise. I remember as a young student that I could not wait to graduate and get on with real life. Even studying for exams, there were times when I calculated how little I could get away with, and spent desperate hours before the exams cramming as much information as possible. For the later studies, the process of learning was as important as reaching the goals. Because it was easier to maintain a holistic view of life, assignments soon mounted up and exams were passed, and every step was as important as the next. It was also easier to maintain motivation, as every little step was a tangible achievement. Interestingly, I had second sittings of my examinations every year bar the last one as a young student, but never had a single resit as an older one.

9.5. More selective approach to study

Last, but certainly not least, research played an important part in studying later in life. It enabled me to determine what best to study, how and where to do so. As a young student, I had chosen my university as the one closest to my home and the subject following in family traditions. I cannot remember doing any research whatsoever. For the MBA, I started out choosing the country where I wanted to study. For business studies I felt the UK would give me a pragmatic, hands-on approach, where learning by rote was practically non-existent. This was a great change from Belgian universities where, in botany anyway, the vast majority of subjects were strictly learnt by heart. As I was not living in the UK at the time, and did not feel in a position to leave my family for a year, distance learning became the only option. I further narrowed the range of universities down to the ones offering accredited degrees, and the final decision was made on the basis of a roll-on entry. The remaining university would have meant waiting for a year, and I did not feel I had the time to lose.

That was the good news. Now come the harder bits.

9.6. Concerns about capability and self-confidence

I had many intellectual concerns starting out on the later studies. I was worried about a failing memory and whether I would be capable of understanding new ideas. The techniques required for learning were rusty, as I had not studied within a university context for a long while, and I was concerned that progress would be slowed down. I battled my self-confidence and doubts as to whether I would be able to handle what was required. Change seemed more threatening, not as exciting as before. As a young student that's all I would be asked to do, study. The rest of the world did not exist. For the MBA, work and family commitments could not be put aside for the duration. A further difficulty, perhaps more related to distance learning as a form of study than to age, was lack of support. As everyone worked at their own speed, there was no distinct peer group to belong to and the process sometimes felt rather lonely. When I did meet peers at a residential seminar, I realised that the group was not homogenous. Ages, backgrounds, previous experience in the business world all differed greatly, as did the speed of learning, because the programme made allowances for students needing from two to eight years to complete the course. This, again, was very different from the homogenous group studying botany a couple of decades before.

9.7. Overcoming practical obstacles, polishing learning skills

The obstacles were practical. I now had responsibilities and needed to balance work and family commitments. Keeping everybody, including myself, reasonably happy was difficult at first. I felt guilty that I was no longer spending so much time on my family's daily comforts and the family seemed to resent my obsession with my studies sometimes. We compromised and I slowed down the pace a little. I learnt to work in bite-sized pieces, sometimes 15 minutes at a time. Flexibility was important.

The strengths seemed significantly to outbalance the weaknesses but finding solutions to perceived or real weaknesses was also interesting. It should be noted that I applied none of these techniques as a young student. These are all 'discoveries' in later life.

As I had been concerned about memory and learning techniques, I looked for and tested as many of these as I could. This entailed looking at music, memory-stimulating exercises and understanding how memory recall works.

I also tried speed reading, because the mass of reading involved, especially with the final dissertation, seemed overwhelming. Time management needed to be optimised. Finally, I needed a faster and more accurate method of taking notes. Below I have described some of the techniques I looked at, and which worked for me.

Having read that slow background music is helpful to remembering, my husband made a tape from all pieces of slow classical music he could find with largos of 60 beats per minute. This helped me focus and relax. I used it most to study for exams and found it helpful to eliminate background noise. I literally found myself in a restful cocoon environment and enjoyed the time spent studying. When I tried to study without the music, I found my stress levels rising, felt interference and could not concentrate as well. Mozart tapes, touted for 'ideas development', were another successful musical crutch. They were in repeated use to crystallise assignment texts or reports, or find dissertation ideas. Again, possibly because I was expecting them to work, they did.

I looked at memory-stimulating exercises and found that these worked, but I did not use them much. I read most of Tony Buzan's books on mind development, and tried to master memory recall (he shows at what intervals and how to memorise information optimally). That, however, clashed with my bite-sized-pieces learning. Mindmapping (27), however, and a couple of recall mindmaps did work. Mindmapping allowed me to make links within subjects and often between subjects and I felt using mindmaps deepened my learning experience. Interestingly, information seemed effectively stored in long-term rather than short-term memory, as I found myself linking different subjects over different years. So, for later exams in human resources (stage 2) I would happily cite information from the stage 1 organisational behaviour course, as it seemed relevant in the context. This would have been impossible for me as a young student, where the summer holidays would be long enough to erase any previous subject matter from active memory. I also tried speed reading but could not get my head around it, sadly.

To improve time management, I read Mark Forster's *Get everything done and still have time to play*. I found it helpful, because it suggested working in bite-sized pieces, which was all I could manage most of the time.

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(27) This technique developed by Buzan presents thoughts graphically in a more natural way than linear note taking. It structures text much better and clarifies issues as anything added later is slotted into the mindmap at the appropriate place.

9.8. Myths about older learners

My personal experience of lifelong learning as an older worker is that it is not a myth, and that older learners can be as successful, if not more so, than younger ones. During my studies I learnt a lot about myself, and felt the later studies were a much richer experience for me in my 40s than they would have been as a school-leaver.

Studying as an older worker was, on balance, a positive experience. However, I have also noticed a downside in the process. Even though learning, in my case, was a consolidation to complete prior practical experience with the required theory, I am noticing that head-hunters and potential employers often do not distinguish between learning as a youngster or later on in life. This means that even though the business experiences exist in a person's career, previous experience seems totally disregarded. A fresh MBA, whether gained at the age of 22 or 47 years, is considered in the same way. This seems rather unfortunate, and may, perhaps, make the studying effort later on in life a little less interesting to undertake.

CHAPTER 10
From steelworker to nurse – the story of Carl

Hanne Randle

Abstract

This chapter gives an account of a man (Carl) in his mid-life who has to change his work orientation totally. The various feelings experienced by Carl and the difficult decision-making processes that he went through in making the transition from being a metal worker to training to be a nurse are outlined. The chapter illustrates the difficulties adults have in negotiating new identities in mid-life when their personal career histories, present family situations and current trends in the labour market have to be taken into account.

10.1. Introduction

Carl is aged 55 years. He is married and has three children. He lost his job in 1997 after working 31 years in a power station as a mechanical engineer in the repair shop. He has had several shorter periods of employment since but it has been difficult to find a permanent job where he lives in Sweden.

All his colleagues also lost their jobs when his old workplace was shut down. He has lost track of them. He does not know where they have all gone or if they have found other jobs. His wife is a preschool teacher, who was very sick at the time this story was written. She is suffering from a long-term illness and her life is at risk. Two of his children have left home and he is now living with his wife and one teenage daughter. The children who have left home are not living in the area.

Because of employment difficulties in his former field of work, Carl has recently taken a completely new direction to his life and started a retraining

programme to become a nurse. His story as told here is based on an interview conducted as a part of the European research project Learning-in-partnership (Learnpartner 2001-04). The purpose of the project was to evaluate the possible role of lifelong learning strategies as a response to restructuring in the European steel and metal sector, and to assess the potential of partnership-based approaches for furthering the learning agenda. The story has been recorded and rewritten into a personal history by Hanne Randle who is a researcher. Carl has read and approved the story and given his permission for publication here.

10.2. My childhood and family situation

I was born in this area (28), grew up here, and have lived here all my life. In 1982 I moved to the village where I live now. I have three children and only one of them is still living at home. My son is 21 years old and is studying in Jönköping to become an automation engineer. My older daughter is 20 years of age and studying photography in a region in the middle of Sweden at a folk high school. She used to study art and paint and things like that. She is thinking of becoming a designer. My youngest daughter is still living at home and will start upper secondary school this autumn. She has got fantastic plans for her future. Among other things, she is planning to go to study in the US. I don't know how it's going to work out; it's too early to say. My sister stayed in Seattle, America, for three months last summer with a relative.

   My wife is a preschool teacher in the village where we live. At the moment she is working part time. She has been working for many years but she has been ill since last summer. It has been really hard for her; she has got breast cancer but is recovering now. She does not have a clean bill of health; you don't get that straight away. I suppose she is as well as she can be, considering the circumstances. We will have to hope that it will turn out for the best for her.

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(28) This region in north of Sweden has been exposed to severe changes affecting several industries and workplaces. Many people in the area have been unemployed for several years. Vacant jobs in the region can be found in the health care sector. Young people leave the region, as they cannot find a way to support themselves. House prices have gone down, which means that it is quite hard for people to move from the area to another region in Sweden, as they cannot sell their houses in order to get money to buy a new house.

10.3. Learning and employment history

My background in schooling was two-years of mechanical engineering in lathes and mills. I have also previously made spare parts for caterpillars and participated in building the infrastructure for the power supply in the country. As a child, I did not think much about where I would work when I grow up, not that I can remember.

When I was young and had just left elementary school I thought it would be interesting to train to become a mechanical engineer. However, I worked as an errand boy for a year. It was possible to find jobs like that then, in a small grocery shop. I knew I could not be an errand boy forever so I saw the mechanical school as an opportunity. The municipality runs the school as a vocational training course. We got to learn how to use lathes and welding equipment.

I worked in a firm in town for six months after I finished the training. I then applied for a job at the power station, a major watercraft company. I worked there in the engineering repair shop for over 33 years, starting there in 1966. I operated the lathe and helped other people to manufacture spare parts. I did repair work and manufactured spare parts for mountain drills and hydraulic drills, pumps and all sorts.

I was made redundant in 1997 and the company has now closed down. At first they were supposed to turn the company around, they started by stripping us of all fringe benefits and then they invested in a doomed project. We all know what happened there. They ended up paying a lot in delay costs and fines, and it is still not finalised. The company was sold to another building company and they spent the last year stripping the company of all the machinery and inventory.

Following redundancy it has been hard to find a real job. I have been through some training programmes, for example a computer programme, which I thought was very good. I also studied some book-keeping classes, only for fun. Then I studied through the initiative for adult education; I studied core subjects such as maths, Swedish language and English language and some computer science.

I was offered the chance to work on and off at an engineering company as a temporary worker. I worked there three months last year during the summer season in July, August and September. I made computer cabinets, operating a corner press. But now it seems to be a hopeless situation at the company, as they are about to sack about 1 000 people. They sacked about

15 people just lately. I would rather have stayed there, as I really liked it. The job was not much like my earlier job but it was in the area of engineering.

I liked my job at the power station. But, like in any place, it had its up and downs. Overall, I think it was a good time in my life. I had the opportunity to work with different things and it was not a stressful job. It was more of a stress in the engineering company, where we had more production line changes and you had to do a lot of thinking. The opportunities for supplementary training were poor at the power station. After finishing at the engineering company I was unemployed until I started the training programme described below.

10.4. Redundancy and life afterwards

I knew six months in advance that I would be made redundant from the power station. I worked my last day in December 1997. It was quite hard, at first. However, I thought it would work out somehow. But each day lorries came to pick up some more stuff and we sent the machines off, one after the other. We realised after a while that we would lose our jobs. We had our hopes up for some time. It turned out to become a long process. It was not much fun. You simply have to adjust to the facts.

I did not think it would turn out to be such a difficult process to find a new job again. I have been working all my life and I wanted to continue to work, but then, it was a lot harder than I thought. We were eight people who worked in the repair shop and three people worked in the stock room. We had four or five professional workers. They just shut the place down when we finished there. That was the end of that. There was nothing left.

At one point during my unemployment, I put my hopes into finding a job at the local firm that manufactures spare parts for brakes, but they were not taking on any people. The last time they recruited people I was working as a temporary worker at the engineering company, which I found more interesting anyway. The work environment is not that healthy at the spare parts company, although it is getting better.

As far as I know, one of my former work colleagues managed to get a job in a school as an assistant. The others have probably worked in the woods, chopping and planting new trees and things like that. One person trained to become a nurse. I should probably call him up. I know that he thought that the nurse training was not that bad. I have worked in two other different places. These companies ask for help when they need it and as soon as the

order book goes down they send me home. I was in the lumber industry for three months in the year 2000.

I do not socialise much during daytime so I do not see any friends or old colleagues. It just does not happen. However, I think workmates are important, as they give you a sense of belonging to a social community. My workmates from the engineering company were very good. You become lonely, even if you do not want to confess that it gets to you. You almost become shy of people. You do not want to go to the shops during daytime. You feel like a parasite. There is a feeling that you are not doing anything worthwhile when you are at home every day. Still, I have been redecorating and painting and I ordered several loads of timber, which I have chopped into pieces. It gives me some sense of meaning while I am unemployed. The central heating in our house functions by using oil and firewood to heat the boiler so I have been burning firewood during the winter season. One has to work. I made a saw and cutter at the power station before I finished my job. I also do more housework than I used to do when I held a job. I help more. It makes sense to be of help. I do not spend any time reading books or watching television during the day, however; I do what most people do.

The worse thing with being unemployed is the uncertainty about what is going to happen? The days are ticking on and the days left to claim dole money (unemployment benefit) are getting fewer ([29]). Then you know it will all end. You cannot qualify for more dole money unless you get a proper job for at least six months; labour-market initiatives do not count for dole money. The big question is, how do you get a job to last for six months? I had a job for three months but it is not sufficient unless it is prolonged. I have not reached the situation yet that my dole money is running out. I do not know anybody in that situation, but it does not make me feel good. Bills and things like that, they keep coming in.

The trade union has not been any help in my case. It has claimed its fee on a regular basis; that is about it. They should help to describe alternatives,

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([29]) People who are unemployed get unemployment benefit for 300 days. When the money runs out they have to get a job for at least six months in order to qualify for another period of unemployment benefit. The terms changed in 2001. Up until then people who were unemployed and were running a risk of losing their benefit, were offered opportunities to get vocational training or temporary jobs for six months. Not all training led to new employment but qualified people to a new period of unemployment benefit. People in the region are accustomed to this system and the fact that unemployment entails getting in and out of activities and a society which takes responsibility for their citizens. Since the new system was introduced, many unemployed people actually run a risk of losing their unemployment benefit, as there are no real jobs to find in the region. This means that unemployment is a greater threat to people's integrity now more than ever before.

if you need help, and what can be done about education and things. I think that when I was working at the power station they got off the hook so easily; they didn't have to take any responsibilities, no help whatsoever, not with anything. The professional workers got one year's pay.

I have tried to fill up my unemployed days with activities. I have studied and the periods of unemployment have not been that long. And I have had my hands full with the house and chopping firewood. So it is not that I haven't had anything to do with my hands. It has not been paid work but it has been important for me. I think anyone who has been working all his life, and been able to manage on his own, would like to continue to do so.

10.5. Back to training

I went back to school as soon as school started back in the first term straight after I was made redundant. I saw it as a chance to continue my education through the municipal school for adult education. I also found it very interesting to study again. It really was. After studying a while, you catch up with things; you can then choose between more courses. The computer programme course was organised from the employment office as a labour-market initiative. I took the chance to take my computer 'driver's licence' then. That was something positive for me; it gave me a meaning to go there. We had the opportunity to study activities of our own choice during half of the time. I chose to study book-keeping only for fun. I went through that course, not that I will ever have any use for it. I also studied maths level A and B, and English language level A and B in the upper secondary school. I studied for three terms, which you are allowed within the system for study allowance.

After the money ran out, it was like I became unemployed again. I got a job in the timber industry for three months. They manufactured big machines for timber and I was working at a lathe. They closed down the firm, however, and moved it to Latvia, I think. But it was a job for me for three months.

Now, as I am running out of dole money, I had to do something about the situation. I chose to join a nursing programme. I was thinking that I must try at least. I have an old workmate, whom I worked with at the power station, and he has just qualified as a nurse. But I am not sure whether he has managed to get a job. He did not have a job before Christmas, but he had just finished his training then. I found it exciting to study again as an option to stay unemployed. I am not worried about the studying. Actually, I thing it is fun.

My family is not against my studying to become a nurse. However, I think my wife is wondering about how I am going to fit into nursing. She has not said anything, but I reckon that she must be thinking that.

The people participating in my study group have all been unemployed for a long time. When I found out about what the acronym MALM stands for, I thought about it a lot. In the beginning I thought it was associated with a name or something. Now I have found out what it means: middle-aged unemployed low educated men. But I have trained myself all my life! I think the title is a discriminating one to give to people. If I had worked in an office and turned papers, I do not think that it would have guaranteed employment. You need these people as well, but you also need people who can hold a screwdriver and make sure that there is power in a machine. I cannot see why it is valued so low. How can they put labels like that on people? I have studied in upper secondary school, have not completed it all, but I have taken some grades.

10.6. Future

I see that there is a possibility for me to get a job in the health sector. I think it is devastating to be on the dole. It is not anything you want to choose, not me anyhow. I do not want to move as my wife has a job here. I cannot sell my house, it is not possible. I would have to give it away. The houses are not worth anything here, now. I could not buy another house with the money. I am not interested in commuting, either. I would like to find a job nearer.

I have participated in this nursing programme for three weeks now and I think it works just fine for me. I like my mates in the group. Next month we are to go out for practice for four weeks. I do not know where I am going to take my practice. We have the chance to make a choice but, in the end, they will have to place us somewhere. I have been thinking whether the care for elderly is something for me. At the hospital they told us that this is the place to find vacant jobs. I have been thinking that I don't know if it turns out to be more difficult to get a job in the hospital, if I do my training in the elderly care, but I am not sure. We are to make a study tour of the hospital.

The issue of pay from the nursing job feels a bit odd to me, though. It is so low paid. It will be a step down for me after working in industry. It is a question of whether there is enough time for the wages to pick up, considering my age. Something must happen about the wage system otherwise the health care service will be short of people.

I see nursing as an opportunity to be able to get a job after this project. I want to see what it is like to work with people. I want to see how it turns out. I am really going to try my hardest in the nursing programme. My daughters think that it is good that I do something with my life. At least that is what I assume they think. They only know about this training project through me. I do not know if they have read any articles about the project. The local newspaper has written about it a few times.

I have a neighbour who works in the home nursing business and he likes it a lot. He says it is not well paid. He used to be a train driver before, but he had to quit because of illness. I think he is still getting the train driver's pay. He did not take part in the same project as I did; he just started to work in the health sector. He enjoys going to people's homes. He likes to meet people and to talk to them and he likes the feeling of being needed. I think that feeling needed can be one of the perks of nursing. In a way I felt needed in the engineering business as I was manufacturing parts for something needed in the business. I was doing something worthwhile working with steel.

10.7. Alternatives

The biggest difference between my old job and nursing will be in the pay cheque. When I worked at the engineering company I was working shifts. Perhaps I will be able to choose my workdays more. I will probably have a greater variety of work tasks than before. However, if I was free to choose, I would like to carry on working at the engineering firm for the 10 years I have left to work. That is how I feel about the situation at the present. It has a lot to do with workmates if you like the workplace, and you have started to get the knack of the job, and studied a bit. And at the same time it can be physically hard work. You will have to work hard all the time. But I liked it there.

The biggest and most noticeable change in my lifestyle after the redundancy is that I have been able to do a lot more things, which I never would have come near to doing, if I had stayed on in the old workplace. I would not have returned to school. I would have missed out on my chances for further education. I think that is a good thing that I came out of it. This was a good part in my life.

Theoretical and critical perspectives on policies and practice

Identification with work: inhibition or resource for learning?

Henning Salling Olesen

Abstract

This chapter discusses ways in which the subjective understanding of one's work (identification with your work) influences one's motivation to engage in work and learning. Although the chapter does not treat the question of older workers in detail, it argues that the life history approach, which takes into account the subjective as well as objective aspects of work, can help us understand the life transition challenges faced by older workers. The chapter draws on the research and experience of the *Life history project* at Roskilde University, Denmark (Salling Olesen, 1997; Salling Olesen and Weber, 2002).

11.1. A political issue and research question

The political concern about older peoples' learning has taken different forms. Until a few years ago it was mainly a welfare-oriented concern, related to older workers' need for learning in retirement. The issue was to depart from work life in a satisfactory way and adopt new activities. Today the labour market requires older workers to learn new skills and attitudes in a changed economic work environment. This gives rise to a research agenda about facilitating learning for changing work and career shifts as people grow older.

These different political issues evoke different research questions and conceptual frameworks which mainly focus on policy-making and labour-market management. However, to understand learning we need a different perspective. In this chapter a life history approach is put forward that focuses on the subjective significance of work for workers throughout their careers: in employment, in unintended redundancy and in retirement.

The classical career trajectory, with one professional or occupational career followed by retirement, is being replaced by trajectories with several careers, ruptures and loops. Transitional situations for older learners – in work or after retirement – are increasingly normal in adult life. This is not to imply that age does not play a role, but it is an empirical question what role it plays. We need to theorise the learning of workers in a more general way. In this perspective, retirement is only different from numerous other transitional phases in adult life to the extent that it is regulated by legal and labour-market agreements.

This chapter briefly illustrates how one might explore the subjective aspects of critical transitions in work life, how they are embedded in one's life history, and have implications for learning. Although the examples provided here do not directly deal with older workers, they do illustrate ways in which the subjective meaning of work plays a significant role in dealing with critical transitions.

11.2. A life history approach

A life history approach implies a different perspective on ageing and learning. First, it must be pointed out that a life history is different from a life course as the former deals with one's subjectively lived and experienced life. A life history approach focuses on the way in which a subject constitutes herself by reflections on societal and biological life conditions.

Older workers can be defined in relation to life course (age) and societal status (wage labour). The concept of life course suggests that there is a natural, incontestable sequence of developments in human life, which are determined by age. Life course research involves the idea of normal biography, hypothesising a quasi-natural series of stages that echoes one's life course (Levinson et al., 1978). However, with regard to third-age discourse, developmental and cognitive psychology has laudably transcended the biological determinism of age and has instead installed a rather abstract individual: a positive and optimistic idea of a human being, who can always learn and develop.

Age and ageing is reflected in society by work and the labour market. Examining the relationship with work is useful in theorising on age in general. It also opens up new questions about how the institutional regulations of the labour market and retirement policies influence ageing. Thus, one may

modify the understanding of the normal biography, seeing it as a specific cultural and social way of performing age.

The focus of the life course history approach is on how age is constructed as an aspect of work identity. By studying the ways in which individuals subjectively relate to work, we can understand individual learning processes, which eventually affect the societal ageing process. Further, one must pay proper attention to the real biological ageing process, and hence to the huge learning effort in the process of adapting to bodily and social changes. The life history approach draws on psychoanalytical theory in acknowledging bodily activities as mediating and interpreting emotions. It also uses phenomenological and pragmatic insights on the bodily and pragmatic nature of experience. The basic biological reality of mortality forms an important aspect of experience and identity building. But life history is in no way a reflection of a linear life course.

In a life history approach we analyse age as the dynamic result of a lifelong self regulatory adaptation and experience building, constructing a generational relationship to other individuals (assuming possible societal positions of ageing) and eventually presenting it in the form of a biographical account of a life. In this way the ageing process can be seen as an 'individual learning a sub-cultural and generational' way of relating collectively to biological and societal conditions. Such a learning process is more open and variable than the idea of a normal biography would indicate.

The interest of the life history approach is to find out how individuals under certain conditions interpret and shape these conditions. The aim is to understand the dialectical relationship between the process of a subject and his objective conditions, natural as well as societal. The approach comprises a critical conception of subjectivity in context, as well as methods to discover these subjective moments.

Key concepts in this approach are: subjectivity, experience, identity and biography. Learning, knowing and competence are examined as aspects of one's life historical experience-building. Work identity here means the lifelong understanding and construction of self in relation to the contradictory conditions of work, and the identifications and engagements that generate the meaning of work and the meaning of specific workplaces. The life history approach is particularly interested in understanding the ways of mastering career changes, as well as the possible conditions and measures that support a learning way of mastering, rather than adapting a defensive survival strategy.

The life history method is about collecting and interpreting biographical interviews. Biography deals with the way in which individual lives reflect the more or less stable influence of certain biological and societal regularities (the normal biography). The latter are interesting in life course research (Bee, 1996; Kohli, 1978), for example, as a way to approach societal processes and structures from the micro-level in biographical sociology (Bertaux, 1981). The life history approach uses the notion of biography distinctly in telling about or describing lives, not presupposing the validity of these accounts. Biographical patterns are seen as symbolic organisations of the experiences of the lives of individuals as well as of groups, which can be interpreted as evidence of the individual, subjective and cultural patterns used in interpreting age and societal order (Alheit, 1995).

In the life history approach one listens to a specific biography and reconstructs and identifies the discourses and images of the social practice that are within it. At the same time one is attentive to ambiguities, ruptures and the remarkable aspects of what is being told and, to some extent, to the way of telling. One can see the life stories and the telling of them as a piece of identity work, in which a new position in relation to the cultural possibilities is taken in a specific context. It is difficult to understand a subjective expression as a conscious and explicit articulation, without interpreting subjective meanings that are vaguely articulated in the speech of those interviewed. The moorlands between the bodily and conscious experiences and their linguistic articulation, between the individual and the cultural meanings, and the multitude and transformations of cultural meanings (e.g. knowledge), are the terrains which need to be studied to understand the way subjectivity is produced and articulated.

The observations of a text may, together with a more or less theoretically informed prior understanding, contribute to identifying dynamics, uncertainties and ambivalent expressions. By working empirically with language interpretation it is possible to go deeper into the questions of these hidden or emergent meanings. For reasons of space and the problems of translation and intercultural transmission, the author has only touched upon this type of interpretation. (For a more detailed elaboration, see Salling Olesen and Weber, 2002). However, the case below attempts to illustrate the theory presented above.

11.3. Women and wage labour

The following example illustrates how complex the process of learning in critical transitions is, and how learning is influenced by, but also shapes, one's work identity and work experiences.

Among the numerous attempts in Scandinavia to solve labour-market problems with the assistance of education and training (a good idea) with the expectation of rapid positive successful results (hopeless expectation) there have been a few successes. One of these was the Danish P47 equal opportunities project that followed on from numerous guidance and training projects for women in the preceding years. This was a one year course of basic education and vocational training within specific sectors, in which employment prospects looked promising. Set up as a systematic experiment, aimed at large-scale implementation, it was an integral part of labour-market policy. The primary objective, following the logic of labour-market policy, was to provide unemployed women with formal competence as a springboard for new vocational areas where employment prospects were good. It is usually assumed that the key factor in this type of programme is training for a specific occupational field. However, the experiment was based to a great extent on pedagogical and organisational experiences gained from guidance and training projects for women. These projects had been organised by women's movements, with the aim of strengthening women's self-confidence and provide a framework for personal development.

The programme was successful in the sense that the women liked it and learned a lot, both vocational and general competences. They gained self esteem and confidence in their ability to learn. It was also successful in relation to employment. The women got jobs at a much higher frequency than in other labour-market training and employment schemes. Some two thirds got a job within the first six months after completion. In effect, a good proportion improved their position in the labour market. Many got jobs which were better than just a job. In this segment of the labour market this is an important achievement. In a recent longitudinal follow-up study 10 years later, the same women were interviewed and this positive picture was confirmed (Larsen, 2002).

Why was this programme more successful than others? It would be foolish to try to extract a single explanation from the complex factors working together and against each other in this programme. To understand what was going on in this programme, three in-depth interviews were undertaken with some participants during and after the course. These illuminated the

subjective aspect of the learning process and the subjective aspects of the women's labour-market situation.

One of the women we interviewed not only improved her self-confidence during her transport worker's education but also drastically changed her ideas about work possibilities. In the interview she talked about her relationship with her husband and mother, giving enough material for interpretation. Her mother, with whom she had been closely connected also as an adult, died from cancer only a short time before she started the programme. During the course, her relationship to other women and to her husband changed almost along the lines of the adolescent development processes. She felt that she gradually became able to face her husband as an equal partner – the education and work competences enabling this. She also gradually learnt the possibility of a woman-to-woman communication which previously was confined to her relationship with her mother. This was not just a private development. It was intertwined with the development of her work identity and her concept of work. During the education she had two different trainee experiences, one being a truck driver, which went far beyond a woman's usual repertoire. This was 'something' to impress her husband and her little son: it was a new social identity. The other experience was in a calm and family-like work group in a storehouse. The researchers interpreted her story of these trainee experiences together with her gradually changing self-confidence as a woman against the background of her previous work experience. Previously she had been, for a while, a maid in a private home. This was a good experience and she felt appreciated and integrated. However, she did not seem to consider this as real work. Her real work career was a series of trivial female jobs in industry, and part-time cleaning at a school while her child was small. In this period, like many unskilled women, she felt the contradiction of being a bad mother in order to maintain a lousy job. The truck driving experience corresponded to her concept of real work, and also to her newly strengthened self-confidence. She experimented with the role of a traditional male, real worker identity that also had an impact in her family relations. The storehouse was different. Although it was also considered real work, it reminded her of her family and relational experiences. A reinterpretation of the experiences of the maid period, however, contributed to a new consciousness of how work environments can be reconciliation between relational experiences and needs, with a concept of work and identity as a skilled worker.

She ended up being employed in the storehouse. It is not the intention of this type of research to go deeply into an individual's psychodynamic

process, for example the relations with the mother and the husband, although they may be important for the regressive and progressive elements in the story. The point is not to be able to discover the truth about this individual woman, but to provide a new context for understanding learning processes. In understanding an individual's story in the context of women's socialisation and a typical relationship to the labour market, we may interpret the meaning of her learning process as an aspect of her actions, plans and feelings.

Looking at this course from a broader perspective, it seemed that the key element which seemed to be a relative success in a capitalist labour market, was the liberation of the woman's own experience and strength in producing self confidence and new worker identities. For the women, the process represented both a progression in personal identity and a historical progress in coping with the labour market. They were able to process the ambivalences which follow from a position at the edge of the labour market. The traditional female role does not represent an alternative to the problems in coping with the labour market and its qualification demands. Modern women see themselves as a resource, obtaining citizenship by adapting to a capitalist labour market. Their subjective learning stories, however, also reveal a potential for something more than that, namely a sense of the human quality of work, and an awareness of the conflicts between being a good worker and being a good parent (Salling Olesen, 1994).

This case suggests that learning processes in critical transitions such as unemployment are closely related to identity processes. They are based on concrete previous life experiences but also related to a broader subjective understanding of self. The learning of new skills may also contribute to a comprehensive change in an individual's understanding of herself. This example has been chosen because the crossroads between vocational (re)training and gender-based relations to work clearly exposes the subjective importance of one's integration in the labour market. It also illustrates a modern societal goal, namely the gradual fulfilment of women's full status as wage labour and the continuing struggles about gender relations in general.

It should be borne in mind that the participation of women in the formal labour market is high in Denmark, around 90 % in the relevant age groups. It is not usual, as in many other countries, to give up employment for several years for birth and child minding. Most women remain in employment after statutory paid maternity leave. In this sense an individual unemployed woman relates to a situation where wage labour is normal. But the cultural

horizon of individual women still includes the alternative of going back to the kitchen, to be a good mother and housemother, and give up employment in the formal labour market. In the case related above this did not happen but it does happen every day for women in similar situations who do not happen to have had a good learning experience and a realistic view of employment, enabling one to have a wage labour identity. For a man, in contrast, it seems inevitable that one has to be a breadwinner.

This case is introduced here because it is argued that this manner of analysis has affinity with the question of older workers' learning (for a more detailed and theoretical discussion about the above outlined identity concept see Andersen et al., 1994 and Salling Olesen, 2001).

11.4. Theorising the learning subject: the notion of experience

The case outlined above shows how individual women can constitute themselves subjectively in relation to a contradictory context of social transformation. It is suggested that identity processes relate to dealing with a historical modernisation process and changing one's form of subjective interpretation of oneself. This change reflects both the subject's own linguistic interpretation of her life and the researchers' comments and suggested interpretations of this interpretation.

There is not space here to present the more general theoretical concept of subjectivity, but this concept has major implications for understanding learning, as well as for developing a methodology. Based on the tradition of critical theory, this concept synthesises theoretical elements from Marxism and psychoanalysis about human subjectivity as an historical and dynamic entity, full of inner contradictions and tensions. It questions the idea of an independent, free and conscious individual subject. The psychoanalytical theoretical background does not imply, as many people usually assume, an individual psychological explanation of subjectivity. Thus, one is not interested in the individual as such. The psychoanalytic interpretation helps to understand individual subjective reactions and consciousness in the context of culture as the latter are produced by culture and produce culture. Culture exists in socially articulated meanings and symbols. Sometimes cultural meanings are attached to artefacts and stabilised in social institutions, but basically they are only reproduced by being used by somebody. In this way it may be possible to theorise the close interactions

between cognitive and emotional aspects in the individual experience, building through one's societal life.

The interest is in the production of human subjectivity through socialisation, in which a specific version of cultural and social experience is embodied, becoming a complex of conscious and unconscious preconditions for subjective action and experience. Contrary to the dichotomy of liberal theory between the free subject and a social, more or less constraining environment, the theory expanded here postulates that subjectivity is constituted in a learning relationship to a biological and historically produced reality. Life is 'matter', and a living creature constitutes himself as a subject by building an ability for conscious and wilful relationship to the rest of the material world in a never-completed process. The dynamics of this experience-building as a contradictory process is at the heart of the theory, which always comprises moments of learning as well as moments of defensiveness. Defensive actions are a mediated form of realism. Some of these actions are not sensitive to social reality, because the subject is paying attention to certain inner emotional dynamics, resulting in limited scope or a coercive focus of attention. Realism is a broad, open, embracing attention to inner as well as outer realities. Obviously, realism is a precondition for learning and for self regulation or autonomy.

Subjectivity in the era of late modernity is itself a result of a modernised childhood and youth, and includes the experience of modernity in a specific way. For a historically adequate version of the subject-object dialectic in the Hegelian sense one should examine the concept of experience of Theodor W. Adorno and Oskar Negt (recently commented on in Negt, 1999). This concept includes the notion of consciousness as being produced as well as presupposed in social practice in everyday life. It assumes that an individual life history is a continuous learning process and the objectivation of collective cultural experiences in the form of knowledge, symbols and norms. The three levels of – everyday life learning, life experience, and collective knowledge – represent aspects or modalities of experience and are seen as being internally defined through each other. 'Experience is the process whereby we as human beings, individually and collectively, consciously master reality and the ever-living understanding of this reality and our relation to it' (Salling Olesen, 1989, pp. 6-7). A more elaborated version of the theoretical arguments presented here can be found in the book mentioned above, in Salling Olesen and Weber (2002) and in Weber (2001).

11.5. A life history approach to older workers' learning

The point here is that a life history approach gives useful insights about understanding (and supporting) learning. From the body of life history research one might argue for a new and more open way of seeing work careers and life trajectories than the one entailed in the idea of a normal biography. This would not only help us understand learning, but also lead to labour market and retirement policies which are far more differentiated and self regulated than the ones being implemented today.

The life history approach gives a different perspective on the contradictions and conflicts in the social conditions and the subjective handling of these conflicts. Life is not a continuous and harmonious trajectory. Yet, traditional labour-market policies suggest that an objective definition of situations and requirements provides simple algorithms for learning to deal with ruptures and transitions. A life history approach draws attention to the subjective meanings of these circumstances and the dynamics in these meanings. Life experiences in critical developments may or may not involve learning in the traditional sense but may mean the adoption of new configurations of meanings, which are more realistic in handling conflict and contradictory situations.

The life history approach may also help to differentiate within the group of people classed as older workers. In spite of the basic class indication of the term 'workers', for whom paid labour is the shared condition, the relationships of different groups of people and individuals to work (and work changes) are different. First, differences between occupations seem significant in the way in which technological and economic changes influence work situations and the ways in which people in certain occupations relate to them. Gender pops up as a significant factor, even if one is not looking for it, both in relation to new gendered patterns of labour-market participation, and in relation to the ways in which women and men tend to see their relationship to employment and to their specific work. A life history approach provides an account of the specificity of the learner, not (only or mainly) as an individual but as a specific subject in a specific situation.

Work and the requirements of working life form the paramount societal condition. The distinction between being 'just an adult' and being 'an older adult', and between retirement and retraining/requalification, can look quite different from a life history perspective. At a practical level this might be a new point of departure for retirement and senior policies. A critical

examination of the ageing process in a life history perspective may enable a productive framework for understanding and supporting learning in mature life, before and after the contingent, societally set borderline of retirement. Even if it is possible to define certain phases and stages in a meaningful way, we gain a better understanding of the dynamics of these phases and the continuities and discontinuities between them from a life history perspective. It is necessary to distinguish between the objective conditions and the subjective experience of ageing and approaching retirement.

In another life history project about engineers' labour-market experiences and work identities, an interpretation was made of an interview with an unemployed engineer, who had almost given up any hope of relevant employment at the age of 55 (Salling Olesen, 2002). This engineer saw his career in relation to the general trajectories of industry and technology. The analysis showed how his personal life history was conditioned by, and his choices intertwined with, the objective history of his industry. He relates a story of resignation which is quite realistic in a profession with a high degree of objective external powers and obsolescence of qualifications. He had been a plant director type engineer of the industrial era and could not see his way back into the work of his profession. He was not happy just to have any job. Sennett (1998) gives an engaged account of the way in which former IBM employees took on personal responsibility for their own failure to understand technological developments and thereby save IBM from its strategic failure in the shift from mainframe computers to PC networks. In my view, Sennett underestimates the objective conditions. These engineers blame themselves, but they did not (in Sennett's account) learn from their labour-market careers. I am not sure 'my' engineer did either, but I think his ambivalent understanding of his own failure opens up some more realistic interpretations.

Older workers' learning should be analysed as an aspect of the transitions which take place in all phases of adult life, and several times. It should be seen as a subjective process with both learning and defensive elements. The examples given above illustrate the complexity of the process. They also show that individual life experiences, situational factors and societal frameworks influence an individual's subjective way of interpreting and acting.

The centrality of work implies that work identity is always a pivotal factor in learning. The specificity of age is, in this context, one of the several factors influencing subjective meaning-making and the construction of agency. For people who are workers in a modern society, wage labour is an identity

parameter. The closeness or remoteness of one's exit from the labour market plays a role in the subjective handling of one's life. The closeness of retirement age would likely act as an impulse to more defensive and less learning agency in relation to the challenges of work. Using the example of the retiring engineer one could parallel this situation with the one of unemployed, unskilled women, for whom the 'retirement to the kitchen' might present an acceptable – or even desirable – escape from a not positive labour market. This parallel seems to makes clear that the subjective handling of critical transitions depends on the specific opportunities of the individual as well as on the cultural framework for offering future pathways. The space in which learning may make a difference is limited but not unimportant, and the contribution from research could be to reveal and define this space.

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Older workers and learning through work: the need for agency and critical reflection

Stephen Billett and Marianne van Woerkom

Abstract

Older workers are caught up in contradictory discourses about work and remaining competent throughout their working life. They are now valued highly but need workplace support in maintaining their competence as maturation processes work against them. Given a privileging of and preference for youth, older workers may face a lack of such support in workplaces. Consequently, to maintain their competence and viability as workers they need to engage purposefully and critically with working life, perhaps more so than younger workers. The following theoretical argument proposes that a critical and 'agentic' (that is, drawing on one's inner agency resources, sense of purpose and determination) engagement with work is a necessity for older workers if they are to maintain competence in their working lives. This individual empowerment of older workers is not seen as distinct from, nor an excuse for, reduced government, industry and enterprise support. Instead, these forms of support will need to augment older workers' agency and critical reflection if they are to perform the roles expected of them.

12.1. Work, change and older workers

Regardless of whether work is becoming more or less demanding, many accounts of contemporary work refer to the constant change in performance demands in the workplace. Maintaining and developing further work competence includes engaging and negotiating with new ways and means of working for all workers. Continuous learning is now required throughout working life. This requirement plays out in different ways, given individuals' work, the degree and frequency of change, their backgrounds, gender, age,

skill levels and the level of workplace support. Older workers face particular challenges, including those arising from skill redundancy, as familiar ways of working and work goals change, with attendant risks to their sense of self. This new learning is not necessarily disempowering, alienating or marginalising but it may be distinct for older workers, because of the impact of the displacement of existing competence and the relative lack of support they may encounter in maintaining their competence.

This chapter makes the theoretical argument that maintaining older workers' competence is likely to become largely dependent on their intentions and interest (i.e. their agency). This agency is necessary to overcome barriers created by the processes of maturation and social marginalisation. We argue that a critically reflective engagement with working life (van Woerkom, 2003) offers a basis for maintaining competence. This case is made first by discussing the prospects for and requirements of older workers' engagement and development in constantly changing work environments. Next, it is proposed that older workers have to find ways of compensating for the limitations that accompany maturation processes and for the workplace support that privileges youth. In conclusion, we argue that individual agency and critical engagement will represent important qualities for shaping the prospects for older workers' development for, and in, the workplace. This case is premised partly on an empirical study into critical reflection at work (van Woerkom, 2003).

12.2. Changing nature of work and older workers' capacities

Much remains unknown about the prospect for older workers to remain competent throughout their working lives. The literature on human development suggests that maturation processes are helpful in expanding the capacities of children and younger adults but work against older workers (Sigelman, 1999). There is an inevitable decline in a range of human functions such as speed in reaction time, processing of novel ideas, the active engagement of memory, and also physical strength (Bosman, 1993). However, evidence also suggests that older adults have developed significant memories and capacities that are effective in resolving problems at work. These capacities can compensate for slower nervous systems (Baltes and Staudinger, 1996) because the level of performance is not dependent on processing capacity alone. For instance,

while typing speeds might decline with age, older typists are as efficient as younger typists, possibly because their wealth of previous experience allows them to predict and execute the typing task more efficiently than their younger counterparts (Bosman, 1993).

> 'So while older adults may well experience some basic processing shortfall, they may well have developed specialised knowledge and strategies that may compensate for these losses. This is posited as being most likely as they carry out everyday activities that are most important to them' (Sigelman, 1999, p. 229).

This view is consistent with functional and relativist preferences for thinking and acting (Baltes and Staudinger, 1996). That is, functional applications that are central to work are also consistent with the preferences for adults' engagement in, and organisation of, knowledge as a basis for performance. Functional applications seem to motivate adult learning of new tasks. Moreover, rather than viewing knowledge as formalisms – set body of knowledge that is objective, as in an objectively definable domain – increasingly, knowledge is seen to be associated with individuals' construal and construction; it is an individual domain of knowledge. This constitutes the relativist claim about older workers.

Cognitive performance does not necessarily decline with age. Even when older humans have been found to be slower with problem-solving activities, brief training can improve cognitive abilities (Sigelman, 1999, p. 186). This suggests that cognitive capacities may endure, yet are required to be engaged and or reactivated to maintain and utilise their potential. In the absence of development coming from internal maturation processes (Baltes and Staudinger, 1996) it is helpful for older workers to seek support from social and cultural sources outside the individual. Yet, at the heart of older workers' capacity to remain competent throughout their working lives is the potential power of their agency and intentionality in exercising their capacities and engaging with the kinds of support, albeit quite indirect, that are available. The exercise of this agency will, in part, be subject to and conditional on the support provided in the workplace.

12.2.1. Support in the workplace

Despite older workers needing workplace support to maintain their competence, there can be no guarantee that this support will be forthcoming. Even though they are being employed in increasing numbers in some sectors, older workers are seen as 'last resort' employees (Quintrell, 2000);

there is little to suggest that they will be a high priority in the distribution of opportunities for training or support in workplaces (Billett and Smith, 2003). This distribution is likely to be shaped by a cultural sentiment in which youth is championed and age is a process of natural decline (Giddens, 1997) with the shrinking proportion of young people likely to extenuate this sentiment and become the subject of increased attention and interest from enterprises. The support individuals need to maintain their working competence includes access to interactions with others and access to new activities. Yet these may not be available to older workers. In increasingly competitive environments, workplaces are becoming more contested. There is contestation between full and part-time workers (Bernhardt, 1999); between workers of different disciplines (Billett, 2001; Darrah, 1996); between old-timers and newcomers (Lave and Wenger, 1991); across genders (Bierema, 2001; Solomon, 1999); and between workers of different affiliations. There are also inevitable personal cliques and affiliations that make available or inhibit access to learning related activities and interactions.

One outcome of highly contested workplaces is that workers needing support may be reluctant to seek it, to avoid drawing attention to themselves, or it may simply not be available to them. Disabled workers, for instance, have particular needs yet are strategic and cautious in their demands for support from their workplace and colleagues (Church, 2004). They fear being seen as liabilities in cost-conscious working environments. Church (2004) reminds us that, for most workers, old age and disability come together at some point. Moreover, European employers are more likely to spend funds on training the young and well-educated than older workers (Brunello, 2001; Brunello and Medio, 2001; Giraud, 2002). Some northern European countries have supportive and inclusive practices for older workers (Bishop, 1997; Smith and Billett, 2003) but elsewhere there is little evidence that legislation (Giraud, 2002) national sentiment or government edict (Bishop, 1997) are able to influence how enterprises expend resources on their employees. Consequently, despite older workers' preference to learn through practice and with workplaces representing potentially effective learning environments, employer support for this learning might not always be forthcoming.

One view is that employer attitudes to older workers will change as they become an increasingly large portion of the workforce with the current focus on younger workers redirected to older workers. However, there is reason for pessimism. In many countries there is little to suggest that, as women have become a greater proportion of the workforce, their employers are providing

the kinds and levels of support required. Where are the childcare centres? Where are the programmes to support their development and promotion? If these have not been provided as the quantum of women workers has increased, how realistic is it to expect support for older workers to increase? Moreover, some jobs now occupied by women have been reduced in status, pay and discretionary roles. So, while there is growing interest in retaining older workers in the workforce, this is within a context that ultimately may not be particularly supportive. This sets older workers the task of 'cheerful striving' – as with disabled workers – as they work around values that are not supportive of that striving. Given that the support they require may not be accessible, it is older workers' capacity to be 'agentic' (that is, drawing on their inner agency recourses, sense of purpose and determination) that will be the key determinant of their capacity to maintain competence throughout working life.

12.3. The role of personal agency

Given the need to maintain their competence throughout working life, in circumstances of inhibited access to workplace support and against the societal privileging of youth, the essential component of older workers' capacity is their personal agency. This agency is central to both their engagement in work tasks and also their work-related learning. There is agreement across constructivist theories of learning that the intensity with which individuals engage in activities is consonant with the level of learning outcomes; full-bodied engagement is likely to lead to richer learning. There are, however, conflicting views about the degree to which this development is dependent on direct interpersonal guidance, rather than individual agency alone. Yet, it seems that individuals are able to exercise some degree of freedom and agency in many kinds of work, except perhaps the most extremely monitored and controlled ones (Billett, 2005; Fenwick, 2002; Hodkinson et al., 2004). When faced with difficult employment situations such as unemployment or underemployment, older workers' personal agency (Bauer et al., 2004; Smith, 2004) stands as a potential base to provide effective responses. Yet their sense of self, which ultimately directs this agency, is threatened, and at times traumatised, by such employment situations (Billett and Pavlova, 2005; Hodkinson and Hodkinson, 2004).

There are at least four premises for proposing a key role for individual agency and critical reflection in maintaining older workers' competence. First,

individuals' engagement with work tasks and interactions affect learning and development (Billett, 2004b). The process of learning and everyday thinking are largely the same and the degree to which individuals engage and deploy their cognitive capacities and experiences shapes whether rich or weak learning transpires. Such outcomes are also affected by exercising energy and intentionality when engaging with tasks and in interactions. Therefore, individuals need to be critically reflective in their working life to consider what is strategic and important for them. Workers in a textile-printing factory and in a forensic psychiatric clinic (van Woerkom, 2003) show differences in their scope of critical reflection. While some workers like to think about organisational policy, others concentrate more on their work tasks in detail. Yet both, in different ways, underpin the importance of this form of personal agency because it assists their capacity for developing and maintaining workplace competence.

Second, older workers may have to rely more on their capacity to engage with the workplace than younger workers. Support for individual learning and development from the workplace and colleagues is likely to be distributed in different ways and to different degrees. The support older workers seek from the workplace may be unavailable or inaccessible, because of a preference for youth. This suggests the need to be agentic and critical in engaging with and reflecting on social sources and also strategic in determining what knowledge they need to gain through interactions with other workers and the workplace. Social contribution to learning and development is found in a relational interdependence between individual and social contributions to individuals' learning (Billett, 2005). From the individuals' perspective, engagement in this interdependence needs to be informed in ways that are functional, purposeful and critically agentic. Workers need to interact with the social world in ways that position them as informed, selective and canny participants.

Third, for older workers' sense of self to be realised, they will be both directed by and dependent on their agency. Through their interactions with colleagues and work practices, individual agency plays an important role in construing from and constructing the social experience that constitutes the workplace (Billett, 2004a). Some claim that there is a significant mismatch between older workers' views of their employability and effectiveness and the perceptions of those who employ them. This sense of self can drive these workers, deploying their capacities to engage in work that they believe reflects their skills (Patrickson and Ranzijn, 2004). In this way, support for learning through work is not made uniformly or unidirectionally. It is made

through interaction of the workplace experience and individuals' construction of that experience, and their subsequent engagement in, and learning through, their work. Because an individual sense of self and intentionality is an embodiment of agency, it remains central to the process of learning and includes the constant remaking of workplace practice. Such remaking of practice needs to be informed by critical reflection so that it can serve to refine and improve work practices as societal conditions change.

Fourth, not only does an individual's agency shape the amount of learning through the intensity of engagement, it also shapes the kinds of learning that occur through the direction of its intentional deployment of capacities. External pressure, such as the level of workplace support, does not wholly determine individuals' exercise of effortful and demanding thinking and acting. Individual interest and intentionality also plays an important role. Moreover, the kinds of critical reflective activities older workers engage in are shaped by their sense of self (van Woerkom, 2003).

Because of these factors, older workers' agency and intentionality are key elements in countering the limitations of ageing and contested and differentiated levels of workplace support, and in contributing to the process of maintaining their competence through negotiating the purposes of their working lives. In particular, their sense of self is central, yet vulnerable, to the contradictory discourses that older workers have to negotiate. Workers need to understand the complex and contradictory circumstance they face and position them in ways that inform about options and possibilities while avoiding the burden of personal blame. It is in these circumstances where critical reflection is most salient.

12.4. Critical reflection

Most conceptualisations of reflection share a rationalistic bias and consist of phased models, where one step logically results from a previous step (Van Bolhuis-Poortvliet and Snoek, 1996). However, in the messiness of everyday work practice, these models seem unrealistic. Also, many developmental models approach reflection as individual and mental, instead of an interactive, dialogical action. Yet, feedback from others is generally considered necessary for rich and deep learning to occur (Ellström, 2001; Marsick and Watkins, 1990). The concept of reflection is embedded within individual internalisation of societal and cultural norms and values, making it inevitably a socially and historically embedded process that is also political and thus

shaped by ideology. In an attempt to address these concerns, critically reflective work behaviour can be conceptualised in terms of learning activities that are inseparably linked with engaging in work (van Woerkom, 2003). This was identified through an inquiry into critical reflection at work (op. cit.) aimed at operationalising critically-reflective work behaviour in seven service and industrial organisations for identifiable, concrete, and practical examples of reflection and critical reflection. Based on the findings, critically reflective work behaviour was defined as a set of connected activities carried out individually or in interaction with others, aimed at optimising individual or collective practices, or critically analysing and trying to change organisational or individual values. These critical reflective processes were enacted through seven dimensions: reflection; experimentation; learning from mistakes; career-awareness; critical opinion-sharing; asking for feedback; and challenging group thinking. These dimensions were later also validated in a self-report instrument tested in a survey among 742 respondents working in various sectors (van Woerkom, 2003).

The survey showed that critically reflective work behaviour is strongly interrelated with perceptions of the degree of being invited to participate in the workplace (van Woerkom, 2003). Moreover, it exists as an active process engaged by the working population, rather than being a process reserved for a few. However, it requires involvement in the workplace including some scope for solving problems and learning from mistakes. Workers feeling invited to participate may be more likely to bring their critical reflection out in the open, engaging in, for example, critical opinion-sharing, asking for feedback and challenging existing practices. When feeling not invited to participate, they may still be critically reflective, but more often on a small scale, in the environment of their own job or in an individual way. But the reverse may also be true. By acting critically, reflective workers may become more a part of the organisation, if their contributions are valued and accepted. Through keeping quiet they run the risk of becoming invisible and forgotten by their managers. Just as the work environment can influence workers' agency, workers can also influence their work environment by their agency. In a textile-printing factory, the workers were generally negative about their opportunities to participate. However, some workers succeeded in creating exceptional positions for themselves through their agency as critically reflective workers. An operator who indicated she was not afraid to criticise work practices openly stated that she was often invited to participate in workplace deliberations at management level. Yet, she also noted that her colleagues were not so often asked to do this. Another operator succeeded

in making his job more interesting by expanding it with extra control tasks, through similar kinds of personal and epistemological agency.

The survey also showed that critically reflective work behaviour is also strongly interrelated with an experience of competence (van Woerkom, 2003) and implies a certain level of risk-taking behaviour. Workers need some courage to withstand social pressure and be critical, to adopt a vulnerable position, to ask for feedback, to take a close look at personal performance and future career, and to experiment instead of following accepted practices. Individuals who feel confident of their competences may be more prepared to take these 'risks'; such workers are likely to stimulate their learning process and, thereby, their exercise of competence. All this is central for older workers' enactment of their agency and critical reflection.

Although situational factors are often emphasised in research on workplace learning, the roles of individual agency and reflection also need to be accounted for more fully in understanding workplace learning environments (Billett, 2004b). However, sometimes there are conflicting demands (e.g. limited numbers of senior positions) that make it difficult to meet individuals' needs. Case studies in seven Dutch organisations in services and industry (van Woerkom, et al., 2003) showed that jobs can change so radically that new demands conflict with old ones and also with workers' identities. The operators in a call centre had to change their definition of competence from 'always try to help a customer, no matter how much time it may take' into 'bring the call promptly to an end in a charming way if questions from customers prove too time-consuming'. The operators, mostly older women, had always taken great pride in helping clients with difficult questions and, to do so, had developed tools and manuals. Although previously seen as the best operators, they were categorised as the worst in the new situation because they had developed a strong sense of professional identity with the previous practices and had resisted the change. Many workers in a cheese factory, a packaging factory, and a textile-printing company were fond of their 'old' competence in a traditional manual handicraft where each product received their special attention. Computerisation of the production process meant they had to separate themselves from their old competence and accept and learn a completely different competence.

In these cases, critical self-reflection and career awareness proved to be crucial. People become aware of their motives and the extent to which they are satisfied by work. However, it turned out that the unknown and uncertainty are an inhibiting factor for career awareness. This leads back to

the difficult task for older workers to learn new practices, including no longer being able to rely on those practices that supported their sense of self in the past while confronting new tasks with their attendant risks to individuals' wellbeing and competence. Here, the imperative for the kinds of critical reflection outlined above comes to the fore.

12.5. Older workers and learning through work

Older workers seem to be caught up in a set of contradictions in maintaining their competence through the later years of their working life. They are claimed to be highly valued for their expertise and experience, reliability and self-management (Quintrell, 2000), yet employers prefer to employ younger individuals. Older workers' capacities, by most accounts, continue to be effective, albeit in different ways from their younger counterparts. Yet, the societal sentiment that promotes and favours youth and vitality, also deals cautiously and silently, and ultimately disarmingly, with age. Consequently, older workers are left to 'joyfully strive' in workplace environments that are often burdensome with their demands, yet meagre and selective with their support. These workers are reminded of the need to change, to remain current, and to develop further skills. Yet this, increasingly, has to be undertaken in their own time and often at their own expense, and even in ways that might be hidden from their employers, to avoid being labelled as requiring extra and unwarranted support. Then there is the reality of an ageing population and a growing reliance on older workers and their need to maintain a quality of life, often in circumstances of diminishing support from government. Yet in the changing environment that needs the intelligence, agency, skills and application of older workers, enterprises and governments may be more concerned with attracting, retaining and supporting a smaller pool of young people, than providing assistance to older workers.

While it is tempting to be optimistic and presume that both government and enterprise values will change with the growing reliance on older workers, there is also some room to be pessimistic. Disney and Hawkes (2003) note that the increase in employment among older workers in the UK is largely among those in their 50s (rather than older), more among women than men and, on balance, among more highly educated workers. In short, they conclude that it was caused by the high demand for labour fuelled by a strong economy rather than policies and practices of engagement with older workers. This pessimism is also supported by analogous circumstances

elsewhere; the increased incidence of female participation in the workforce has not led to enhanced provision of support and engagement for those women. This is similar to the situation which faces many older workers, required to apply their agency in demanding ways to maintain their sense of self and place in the workplace. Increasingly, this task is becoming somebody else's business: in this case the older workers themselves. Here it is proposed that to maintain their competence and maximise the support that is available, older workers may need to engage critically, effortfully and purposefully with working life.

12.6. References

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CHAPTER 13
Lifelong learning funding policies for older workers in the Netherlands: a critical review

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Abstract

This chapter examines lifelong learning policies for older workers in the Netherlands. These are explored in relation to public and private investments for the learning of older workers in the context of promoting more flexible life courses. The analysis focuses on the collective and individual dimensions of political debates about the so-called life-course savings regulation. This is discussed in relation to the willingness of older workers, collectively or individually, to save for the purpose of investing in their own education and training, compared with their willingness to save for early retirement.

13.1. Lifelong learning and the European policy agenda

In the current period of global and European transformations, including the expansion of the EU to 25 Member States in 2004, it is impossible to locate a policy document on education and training that makes no reference to lifelong learning. Lifelong learning now frames the worldwide education and training agenda. It is used to legitimise education and training policies, to identify groups at risk of exclusion and to argue the case for specific policy instruments. Implementation of lifelong learning policies is currently regarded worldwide as the key to meeting the challenge of globalisation, the knowledge society and competitive knowledge economies. It can also help

create knowledge jobs, generate individual employability, reduce unemployment, and secure the social inclusion of groups at risk of exclusion from the learning society (Hake, 2003).

At the Lisbon summit of the European Council in 2000, the EU agreed to pursue the objective of creating '[…] the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion' (Council of the EU and EC, 2004; see also Descy in Chapter 4). In the European Commission publication *Making a European area of lifelong learning a reality* (EC, 2001), and the European Council's 2002 resolution on lifelong learning (Council of the EU, 2002), the EU has adopted lifelong learning as the basis of its education and training strategy to achieve the Lisbon objectives. Lifelong learning is now regarded by the EU as the high road to the European knowledge economy in 2010. However, by mid-2004 the European Commission was already expressing serious reservations about whether Member States were making progress towards the national targets established in Lisbon as the baseline for the reform of education and training systems (EC, 2004). In a major reformulation of the Lisbon strategy by the EU in February 2005, one of the major policy priorities retained from Lisbon relates to the problems associated with raising levels of investment in education and training, promoting high rates of labour-market participation by older workers and meeting their specific education and training needs. This is a timely recognition of the problems associated with developing knowledge economies in the context of demographic change and ageing – often low-qualified – workforces throughout Europe.

This chapter examines some of the issues associated with lifelong learning policies in the Netherlands, particularly public and private investments in lifelong learning for older workers. Particular attention is devoted to the political discussion about collective arrangements and individual responsibilities for investments in education and training, and how specific policy instruments impact upon older workers. Specific policy instruments are examined for their contribution to increasing participation by older workers in education and training in the context of more flexible life courses. The analysis focuses on the collective and individual dimensions of political debates about the so-called life-course savings regulation as proposed by the centre-right coalition government following its election in 2002.

13.2. Lisbon strategy and generational skills gap

The dominant policy discourse in the Netherlands during the late 1990s included growing emphasis on integrating lifelong learning and labour-market policies to promote the employability of the Dutch workforce. Following the Lisbon accord in 2000, the 'employability agenda' focused on investments in education and training for specific target groups (Hake and van der Kamp, 2002). Policies became increasingly focused on closing the so-called learning gap. This was most commonly formulated in terms of a skills gap between the demand by the Dutch knowledge economy for highly qualified employees and the inadequate educational and training levels of many in the current workforce. The skills gap was articulated in terms of the comparatively large number of low-qualified workers in the Dutch workforce without a 'start qualification' and their weak position on the labour market (Hake, 2003). As a norm, the minimum start qualification for successful access to, and survival in, the labour-market was defined as the completion of an apprenticeship or its equivalent.

A serious skills gap in the Netherlands first attracted attention in the OECD economic survey of 1998 which reported that 37 % of the Dutch workforce did not possess a start qualification (OECD, 1998). A report from the Ministry of Economic Affairs (Ministerie van EZ, 1999) focused on the exclusion from the labour market of different categories among the low qualified without start qualifications. It referred to low participation rates by the low qualified among 55-64 year olds, immigrants, female single-parents, and those on occupational disability benefits. The OECD expressed similar concerns in its subsequent economic survey in 2000 (OECD, 2000) which concluded that the Netherlands scored low to average in comparative terms. It referred to the serious manifestation of 'structural inactivity' of the potential Dutch workforce. The OECD survey also confirmed that the Netherlands performed poorly, in comparative terms, in public and private investments in educating and training these categories of the workforce. In its 2002 report on lifelong learning in the knowledge economy, the Social and Economic Council of the Netherlands (SER) – an advisory body comprising representatives of the social partners and independent members appointed by the Crown – referred to this situation in terms of: '[…] the problem that the training participation rate among certain high-risk groups, such as older and low-skilled workers (including many ethnic minorities), lags behind the rest of the Dutch population' (SER, 2002). Similar concerns were again expressed in the 2003 National action plan (NAP) for employment with references to the

education and training needs of young drop-outs, low-qualified women, older workers and ethnic minorities (NAP, 2003).

As elsewhere in the EU, the more specific problems of the 55-64 year old cohort in the workforce have now reached the top of the Dutch policy agenda. This is articulated in terms of demographic change, the 'greying of the population' as a whole, significant ageing of the Dutch workforce, and the problem of funding retirement pensions. In the context of lifelong learning policies, the NAPs submitted annually to the European Commission by the Dutch government first indicated that the education and training needs of older workers were of increasing significance in the knowledge economy. The 1998 NAP referred to the need for higher levels of participation by older people in the workforce, reducing their high drop-out rates, and the need for them to acquire new skills to promote their employability (NAP, 1998). The 1999 NAP pointed out that active participation of older people in the labour-market in the Netherlands was low in comparison with other EU Member States (NAP, 1999). Only 33 % of the population aged between 55 and 64 years were employed, compared to averages of 50-60 % elsewhere in the EU. Among those older than 60 years the figure is 13 %. It also pointed to significant generational differences in participation in education and training. While participation by those aged 25-34 is 45 %, it is 22.5 % among those aged 55-64. This is significantly lower than comparable levels elsewhere in the EU. The Social and Economic Council report in 2002 also articulated the need to maintain labour productivity and higher participation rates among older workers in the context of the ageing population (SER, 2002).

Policy measures considered by the second government led by Wim Kok (which preceded the current government) were first formulated in terms of the consensus established during the mid-1990s about the respective responsibilities of government, social partners and individuals for investments in lifelong learning. The social partners and individuals were regarded as primarily responsible for investments in the education and training of older employees with start qualifications. This should take place via collective bargaining agreements – 46 of 125 collective bargaining agreements currently have such arrangements – and the deduction of individual investments from income tax. The government regarded itself as financially responsible for those older members of the workforce without a start qualification. To this end, the Kok-led government encouraged employers and older employees to invest in education and training through the introduction of fiscal facilities that reduced liability for corporate or personal income tax. The cabinet introduced a significant fiscal facility for

employers who invested in training employees older than 40 years. An additional fiscal facility for employers encouraged them to engage in training older unemployed people without start qualifications. To encourage older workers themselves to remain in work, a new fiscal facility was introduced in early 2002 that reduced personal income tax liabilities of individuals opting not to take early retirement. The Kok-led government also held discussions with the social partners about targeting older workers without start qualifications during the experiments with 'individual learning accounts' (ILAs) which were announced in late 2000 and commenced early in 2001 (see also Renkema and van der Kamp in Chapter 16).

The two latter proposals marked the tentative transition in policy-thinking from collectively funded education and training for specific target groups to stimulating a demand-led approach focusing on the responsibility of individual workers themselves. In 2000, the Minister of Social Affairs and Employment asked the Social and Economic Council to prepare a report on lifelong learning and working life in the knowledge economy, with specific focus on policy instruments to encourage lifelong learning among low qualified members of the workforce. Such developments were predicated on the growing recognition that demographic change and the ageing labour-force called not only for greater participation by older members of the workforce but also involved extending working life and increasing pension funding. This redirection in Dutch policy-making changed the focus from the issue of education and training for older workers to the need for active measures to restrict early exit from the labour market and increase retirement pensions funding. In March 2000, the government's policy paper *In good jobs* (Ministerie van SZ en W, 2000) argued the need to change the prevailing pattern of choices made by older workers for paid employment and early retirement. Policy options suggested included: modifying or even abolishing arrangements for early retirement; a more gradual process of withdrawal from employment; transitions from full-time to part-time work; and retirement at a later age, together with a flexible rather than a fixed age of compulsory retirement at 65. The proposed extension of working life was only hesitatingly recognised, however, as a factor that would increase the problems associated with the low education and training levels of older workers. To investigate such issues, the Kok government appointed a task force on older workers in June 2001 that was expected to propose appropriate policy instruments.

13.3. Lifelong learning becomes controversial

The image of a deep-rooted consensus on Dutch social and educational policies during the two centre-left Kok governments from 1994 to 2002 was rudely shattered by unaccustomed ideological confrontations during the general election in May 2002. Following the election, Jan-Peter Balkenende, a Christian Democrat, became Prime Minister in a centre-right coalition government including ministers from the pro-Fortuyn (right wing) party. The new government immediately proposed EUR 20 billion of cuts in public expenditure to roll back the welfare State's collective services and to encourage more financial responsibility by individuals themselves. This had implications for lifelong learning policies, particularly on funding education and training for older workers and early retirement arrangements. The new government planned to:

(a) abolish collectively financed early retirement arrangements;
(b) introduce an individually financed life-course savings regulation;
(c) require all employees to work until 65;
(d) possibly postpone retirement to 67;
(e) abolish all fiscal incentives for employers who invest in training older workers.

This marked the disintegration of the recently established social consensus on fiscal incentives and individual incentives in the form of ILAs as major policy instruments to encourage the low-qualified, including older workers, to engage in education and training throughout working life. The new government's first Lisbon strategy progress report to the European Commission in 2003 referred to the declaration by the majority parties of the newly elected Parliament in 2002 that: '[…] lifelong learning is now a controversial issue' (EC, 2003). The rapid collapse of the highly unstable first Balkenende-led government delayed the response to the Social and Economic Council report on lifelong learning and the knowledge economy until after a new general election. In its belated response in November 2003 (Ministerie van SZ en W, 2003), the second Balkenende government proposed a view that the key problems in the Dutch labour market were the high levels of young drop-outs from secondary vocational education and the shortage of highly-qualified employees in the natural sciences and technical subjects. The government emphatically indicated that it did not consider it '[…] opportune to introduce the ILAs alongside the introduction of its own proposals for a life-course savings regulation'. As a consequence, the

cutting-age of Dutch policy discussions about policy instruments to encourage investments in the lifelong learning of older workers is now indirectly formulated in terms of the introduction of the life-course savings regulation. This specific policy instrument now forms the fault-line in Dutch policy discussions on pensions and education and training for older workers. The relevant question here is what does the life-course savings regulation offer to older members of the Dutch workforce – whether employed or unemployed – regarding investments in their education and training during later, and extended, working life?

13.4. Life-course savings regulation: for rush-hour families or older workers?

The life-course savings regulation introduced by the new government is intended to enable individual employees to save, free of income tax, to finance breaks from paid work. It is an opt-in individual savings arrangement with no collective basis. A maximum of 12 % of annual income can be saved from the age of 18 and this would mean that a maximum of 18 months of paid leave could be saved during normal working life up to retirement at 65 years. Savings withdrawn early in the life course reduce the capital sum available in later periods of working life. The capital sum saved by individuals can be used only for purposes clearly defined in the draft legislation: undertaking caring tasks in one's immediate or extended family; parental leave; sabbatical leave; education and training; and financing a transition to part-time work prior to retirement at 65. It was not intended for the reparation of personal pension gaps or financing early retirement.

Supporters of the life-course savings regulation argue that it is an effective response to changes in individual life courses and the need to increase the possibility of more diverse patterns of participation by both men and women in paid employment and a new work-life balance. They argue that it will offer individual employees more opportunities to determine the division of time between work, learning, leisure and caring tasks in the family. It is regarded by Christian Democratic supporters as a policy instrument that will ease the burdens of younger families – the so-called rush-hour families – who have to combine the tasks of working and caring for children during the 'caring peak' in family life. Supporters argue that it can also be used to save for educational and training leave, known as 'refreshment leave'. The government's response in November 2003 to the Social and Economic

Council 2002 report argued that: '[…] taking account of the increasing pluriformity of work careers, the regulation offers a much broader perspective than facilitating mere "maintenance work" with regard to occupational careers' (Ministerie van SZ en W, 2003). This was an explicit critique of the Kok government's commitment to limiting ILAs for training purposes. It is also argued that the life-course savings regulation will benefit the older generation of workers who will now continue to work longer. Given the new government's intention that workers will have to continue working for a longer period, it is argued that the life-course savings regulation will enable employees to use their rights to leave for a period of educational leave, and then subsequently resume working for a longer period.

The life-course savings regulation has been criticised by the centre-left opposition parties, trade unions and women's organisations, on the grounds that it manifests the Christian Democratic commitment to the traditional nuclear family. They argue that it is gender-biased and reinforces the standard life courses of paid work for men and unpaid caring work for women. It is seen as reinforcing the male breadwinner model of household economies. Opponents regard it as overly focused on the 'care-peak' period in rush-hour families, serving mainly as an option available for women to take leave from paid work for caring purposes, while not encouraging men to take leave from paid work to perform caring tasks. In March 2004, the Minister of Social Affairs and Employment announced in a letter to Parliament that he rejected a request by the Green-Left party for an assessment of the impact of the regulation on the emancipation of women from caring tasks and their greater involvement in paid work. Trade unions, in particular, argued that the individual nature of opting-in to the life-course savings regulation undermines collective bargaining agreements and the basis for solidarity in collective social insurance. Their argument is that an opt-in individual savings regulation will benefit higher income groups and penalise the low-paid who cannot afford to save – even when tax-free – from their comparatively lower wages. They prefer a compulsory scheme based on collective bargaining agreements, financial contributions by employers and guarantees for the low-paid. Opponents also argue that the life-course savings regulation is socially discriminatory in that it is only open to those in paid employment and it is not an option available to the unemployed, those on occupational disability benefits and those doing unpaid work in the home. The financing of older female 'returners' from unpaid work to the labour-market is an unanswered question. Regarding the use of the life-course savings regulation for funding investments in lifelong learning throughout the life

course, opponents argue that there is no guarantee that the capital sums saved by individuals will be used for education and training.

13.5. The life-course savings regulation and early retirement

During the annual spring round of negotiations between the government and the social partners in April 2004, the trade unions proposed that the life-course savings regulation should be linked with the government's intention to abolish favourable fiscal facilities for early retirement. The unions proposed that the life-course savings regulation should be compulsory and that all employees should be involved in a collectively financed system with contributions by both individuals and employers. They wished to make use of the life-course savings regulation to finance at least one and a half years of early retirement. Such proposals meant that the life-course savings regulation would no longer be used for its original purpose of facilitating breaks from paid work throughout working life; it was no longer articulated in terms of promoting flexible patterns of participation in work, caring, or education and training throughout working life. Instead, it was viewed by the unions as a policy instrument to reintroduce funding measures (which the government intended to abolish) for the early retirement of the baby boom generation. The unions made no reference to financing education and training for older workers. They simply wanted to retain the right to early retirement.

The social partners jointly put forward a collective arrangement for the use of the life-course savings regulation to finance two years of early retirement. This was rejected by the government which insisted on the voluntary nature of the individualised savings regulation rather than a collective arrangement. It opposed the use of the capital saved to finance early retirement. In a letter to Parliament on 3 May 2004, the Minister for Social Affairs and Employment argued that the life-course savings arrangement was intended to create more individual choice and personal responsibility. The resulting stalemate centred on financing early retirement within the narrow margins of 62.5 or 63.5 years of age. Policy negotiations broke down when the government unilaterally withdrew its offer of the voluntary opt-in arrangement for individual use of the life-course savings regulation for early retirement. It announced that it would return to its original proposal that all employees work until 65. The trade unions withdrew from the negotiations on 6 May 2004

and recommended their members to reject the offer of an individual focused arrangement. On 6 July, the government put forward legislative proposals that meant the abolition of early retirement and continuing working until 65, abolition of fiscal support for early retirement schemes, and individual use of the life-course savings regulation for retirement at 63 years of age, while honouring the rights of those over 63 who had already built up early retirement entitlements. Following consultations by the trade unions with their grass-roots and a major national demonstration in Amsterdam in the late summer of 2004, the government and the social partners arrived at a compromise which included that the life-course savings arrangement could be used for funding early retirement on the basis of individual savings. The trade unions hoped to recover the collective element in funding arrangements for early retirement through collective bargaining agreements between the social partners.

During this period there were few, if any, references to the education and training needs of older workers who will have to continue to work for longer periods. The Dutch discourse on financing investments in lifelong learning for older workers had been decentred both by the emphasis of the centre-right government on an individual opt-in arrangement for the life-course savings arrangement and by the argument of the trade unions that the life-course savings regulation should be used solely for collective arrangements for early retirement. The entitlements of older workers to education and training opportunities have not been voiced during a political debate dominated by arguments for and against the abolition of collective rights to early retirement. This narrow debate now seriously overshadows Dutch lifelong learning policy discussion. Retirement and pensions funding is now the main policy focus rather than the issue of investments for educating and training older workers.

13.6. Lifelong learning policies in transition: traditional or flexible life courses?

During the final years of the Kok government, a number of contributions to the Dutch policy discussion articulated a life-course perspective on investments in lifelong learning that addressed the policy implications of increasingly flexible life courses. In 2000, a study of changes in the life courses of different generations focused on changing relationships between participation in family life, relationships, work and education across the life course (Scientific Council, 2000). This report concluded that government

policies respond inadequately, in particular to changes in the life courses of older people. A Social and Economic Council report in 2000 argued for a life-course perspective focusing on emancipation policy (SER, 2000). With reference to increased recognition of the flexibility in life courses, diverse combinations of working and caring tasks by men and women, and promoting employability in all phases of working life, including older workers. It criticised policies that focused on the combination of paid work and caring during the child-caring period of women and on women as carers, the so-called combination model. The report also argued that caring is not the only reason for individuals to reduce their involvement in paid work to take a career-break. It referred specifically to participation in education and training throughout the life course in relation to economic and social participation.

In 2001, the Social and Economic Council published a research report on the consequences of changing patterns of participation in paid work and the development of flexible life courses. This report agued that the standard life course of full-time paid work and the single breadwinner role for men was in decline and that social policy should take account of such long-term developments (SER, 2001). The Kok government's Policy agenda for lifelong learning in 2002 also articulated increasing diversity in individual life courses. This was narrated in terms of the individualisation of social life and new combinations of learning, working and caring in individual life courses. The report proposed that: 'this leads to an increasing demand by individuals for greater freedom of choice and responsibility in questions about the redistribution of education and training throughout the life course' (Ministerie van OCW, 2002). It argued that there is a growing awareness that individuals should have greater opportunities to manage their own life courses and take responsibility for phasing their participation in education and training in flexible learning careers. In early 2002, the Kok government presented a report to Parliament that addressed issues associated with a life-course perspective on social policies. This report identified '[…] the policy problems resulting from the fact that today's workers are increasingly deviating from traditional patterns of training, work, family responsibilities and leisure' (NAP, 2002). It argued that a range of new policy options will be necessary to meet these problems of differentiation in flexible life courses which do not fit easily into traditional social and educational policy frameworks.

Despite such an articulation about the implication of flexible and diverse life courses, the dominant Dutch discourse about lifelong learning since the election in 2002 has focused on investments in lifelong learning in just one

dimension of the life-world of adults, namely the world of paid work. Dutch policy discourse is articulated in terms that are more reminiscent of the social and educational policy frameworks of industrial society. In industrial societies, collective and private investments in education, social insurance during paid work and unpaid caring work, and retirement benefits were articulated in terms of three social ages: education and training in the youth period; paid work in adulthood for men and unpaid work for women; and the withdrawal from paid employment into retirement (Guillemard, 2000). New funding arrangements for lifelong learning in the Netherlands, for example the life-course savings regulation, have been articulated in terms of policing the life course and the generation-differentiated participation in lifelong learning. This discourse is narrated in terms of the standard chronological system of social ages that determines investments in learning for earning (Coffield, 2000).

Negotiations about the life-course savings regulation and early retirement in the Netherlands have constituted a continuation of the 'policing of the boundary' between the two traditional social ages of working life and (early) retirement in industrial society. Policy narratives articulated by the current centre-right government prefer traditional policy options, such as working until 65, that are more appropriate to the traditional life course of industrial society. The government's position was announced in its response in 2004 (Ministerie van SZ en W, 2004) to the 2003 report by the task force on older workers. This report, entitled *They worked long and happily* (Task Force, 2003) narrated the joy of continuing to participate in working life to a later age than has been usual for the Dutch workforce in the last decade. This narrative refers to demographic change, the 'greying' of society, the ageing of the workforce, and the low qualification levels of older workers. In the cabinet's response it has returned to the social policing of the transitions by older (male) workers from paid work to delayed retirement (Ministerie van SZ en W, 2004). It concludes that there will be a shortage of workers and that the solution is for people to continue to work up to 65, which was the standard age of retirement in industrial society. Investment in educating and training older workers is not articulated and it ignores the reiteration by the task force of the arguments for investment in training older workers that were voiced by the Kok government and the social partners. The priority is, by means of a public information campaign, to change the widely-held negative attitudes in Dutch society about the productivity of older workers.

Central to the government's position is the extension of working life for all to 65 years. More recent measures require unemployed workers older than

57 to look for work, while the evidence is that they will have little success in this endeavour. Older unemployed workers now face the threat of reduced unemployment benefits, shorter entitlement to benefits, and, most recently, the requirement that older unemployed workers should 'eat up' their personal savings before they can qualify for benefits. These arrangements were not accompanied by specific policy instruments to finance investments in educating and training the older members of the labour force. One recent opening in this direction is a proposal, announced by the Prime Minister in January 2005, to reintroduce a fiscal facility for individuals who can provide evidence of their engagement in education and training to improve their employability. In February 2005, a spokesman for the government coalition partner, the Democratic Party, proposed that older workers should be compelled to participate in education and training.

The policy narrative of the present Dutch government ignores the 'situated necessity' of older workers to continue to learn if they are to find a job when unemployed, survive in their current job, aspire to a better job, let alone move to another firm. This situated necessity of engagements in education and training in later life is now impacting on the lives of adults who left initial education in the industrial society era of the 1950s and 1960s, and who have not profited from education and training organised by employers. Low-qualified older workers are traditionally not participants in lifelong learning and they are not the primary targets of investments in education and training by employers. In addition, it is too often assumed that they cannot articulate their individual learning aspirations, or manage their own learning careers, let alone become the entrepreneurs of their own employability (Hake, 2003). In this respect, it is important to note that the low-qualified participants in the Dutch experiments with ILAs reported that they had become aware of their own personal development and had acquired control of their own learning careers (Geertsma et al., 2004).

13.7. Intergenerational solidarity

Analysis in this chapter has focused on how policy-relevant institutions and organisations steered policy formation regarding older workers within the framework of the knowledge society. Lifelong learning in the Netherlands is, above all, articulated in terms of the competitiveness of the Dutch economy, the employability of the labour force and the consequences of an ageing population. It is narrated within the perspective of bringing the Dutch

economy into the top five European knowledge-based and high-skill economies in the light of the Lisbon targets for 2010. According to the Social and Economic Council 2002 report: 'the Netherlands aims to be one of the trendsetters in Europe, including the area of lifelong learning' (SER, 2002). This has resulted in an emphasis on producing a well-educated workforce, maintaining the employability of workers through continuous updating of knowledge and skills, and making workers individually responsible for their employability. A striking feature of the policy discussion about lifelong learning in the Netherlands is that it is predominantly conducted in terms of the labour market, shortages of skilled workers, and the need for older workers to remain longer at work.

Policy narratives on funding lifelong learning in the Netherlands have largely failed to address the lifelong redistribution of entitlements to publicly-financed education and training irrespective of age. Lifelong learning needs more than policy instruments that require workers to take individual responsibility for updating their knowledge and skills in response to the short-term conjuncture of the labour market. What is required is a more radical reconfiguration of education and training policies taken together with working conditions, social security and pension policies (Supiot, 2001). A life-course perspective on lifelong learning is at odds with the current pattern of public and private investments in initial and post-initial education during working life and the policing of retirement. It calls for an age-integrated, rather than an age-differentiated, redistribution of learning opportunities throughout the life course (Guillemard, 1997; Hake, 2003).

Efforts to maintain the right to early retirement for the generation of 'baby boomers' in the Netherlands – as elsewhere in the EU – now threaten to undermine the basis of intergenerational solidarity. Such solidarity has to be renegotiated in terms of the redistribution of rights to lifelong learning throughout the life course and to flexible retirement. Those no longer participating in the knowledge economy are still citizens of the knowledge society. The current impasse in Dutch policy discussions about early retirement raises serious questions as to whether the key stakeholders – government, employers, and employees – are either aware of, or are prepared to deal with the need for, a fundamental rearrangement of collective and individual responsibilities for investments in learning across the life course. The lifelong learning discourse in the Netherlands has not yet started to address the urgent need for a new social equilibrium in the knowledge society which is also a greying society. This must be based on mutual solidarity, social justice, individual responsibilities, and the

overarching priority of social inclusion irrespective of age (Supiot, 2001).

The European Commission, national governments and the social partners need to recognise the importance of collective investments in the learning careers of the older generations, in particular of older workers and those no longer involved in paid work. Flexible life courses in the knowledge society call for fundamental changes in public and private investments in lifelong learning, throughout the life course and into the non-productive age of extended retirement. This calls for intergenerational solidarity that demands the reallocation of social resources from the younger to the older generations and, in particular, to low-qualified older workers. This will require the reconfiguration of investments in education and training, social security, and pensions throughout the increasingly unpredictable lives of individuals, families and communities, but above all between the generations. Lifelong learning is an open-ended historical and societal project that is embedded in the self-regulation of both individual and collective subjectivities in the late modernisation of European societies. Radical policies are now demanded that will enable individuals, both the younger and the older generations, to self-regulate their learning careers in the turbulent and uncertain times of a knowledge society that must also be an inclusive and intergenerational learning society. Such policies should strike a balance between collective and individual contributions towards investments in education and training, social security and pensions.

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PART VI

Impact of workplace practices
on older workers' learning

CHAPTER 14

Building workplaces in line with the ageing process

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Abstract

Drawing on research on the experiences of different companies in Germany, this chapter looks at the effect of age on performance and the possibility of ageing-appropriate job design. It examines the role of further training and lifelong learning, as well as the relevance of the concept of 'occupational biographies'. The challenge facing workplaces is to reestablish the situation in which the vast majority of older employees can remain at work until they reach the statutory retirement age; workplaces in which people can 'grow old' are needed. However, actions to address this, such as improving working and occupational health conditions and facilitating lifelong learning, should not be narrowly focused on the older working population but must address all age groups, in particular today's middle-aged generations.
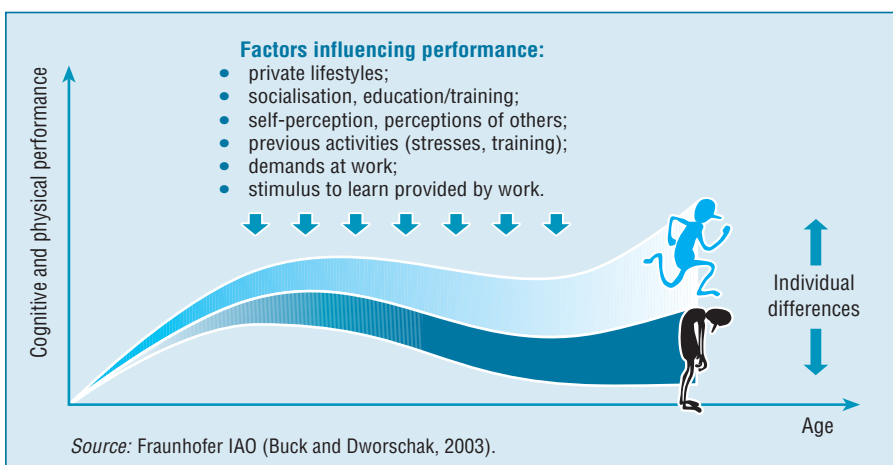
14.1. The effect of age on performance

When workers abandon certain types of work activity before retirement age, this is not usually the inevitable result of biological ageing. Some people continue to be innovative, productive and well paid when they are 70 years of age, while others are considered too old for their jobs when they are only 45. The reason for the latter is less to do with the biologically determined changes in people's work capacity, which accompany the ageing process, than with the type of activity and career orientation that has led to such a decline in performance (Behrens et al., 2002).

Indeed, qualitative performance increases as people grow older. Studies and practice evaluations confirm that ageing is accompanied by a shift, rather a decline, in performance (Karazman, 2000; Karazman et al., 2003). While a decline occurs in physical work capacities, mental work capacities (awareness, concentration) are maintained and cognitive and social skills are enhanced.

A key area in which psychological and gerontological research has concentrated on is the development of cognitive performance characteristics and personality changes accompanying the maturation process ([30]). Numerous studies concur in demonstrating that personality characteristics such as a person's level of introversion/extroversion along thinking, emotional and action dimensions, such as emotional stability, self perception or self-efficacy (locus of control) and a person's beliefs, remain largely stable well into old age. Simplifying the findings somewhat, one can summarise the empirical studies on mental performance as follows:

(a) older adults generally exhibit deterioration in reaction times and perceptual skills; information processing also slows down in old age. These performance deficits can often, to the extent that they occur at all, or play a role in the work process, be compensated for by making suitable changes in work arrangements;

(b) performance prerequisites such as memory, creativity, problem-solving skills, intelligence, social skills or the ability to cope with stress are highly dependent on the amount of stimulation people are subject to in the course of their working lives. If they are actively supported by training and learning opportunities, these abilities can be maintained or even improved in old age.

Figure 1. **Individual differences in the development of work
performance with increasing age**

Factors influencing performance:
- private lifestyles;
- socialisation, education/training;
- self-perception, perceptions of others;
- previous activities (stresses, training);
- demands at work;
- stimulus to learn provided by work.

Cognitive and physical performance

Individual differences

Age

Source: Fraunhofer IAO (Buck and Dworschak, 2003).

([30]) Many studies of age-related changes in performance characteristics, however, relate to the group aged over 65. Whether the outcomes of these studies are relevant to people of working age is a moot point.

Even if certain typical changes in performance parameters can be shown to take place as people grow older, these by no means affect all those in gainful employment in a particular age cohort to the same extent. The range of individual differences in performance grows wider as people grow older. In other words, the same parameter may fall, stay unchanged, or even improve within one and the same age group. The view that age-typical changes affect all older employees in the same way, must be supplanted by a view which focuses on individual performance and ability. Personal characteristics, occupational biographies, physical constitution and level of training are all important factors influencing the prerequisites of performance. It must also be taken into account that many employees develop useful compensatory strategies for coping with the age-related limitations they experience at the workplace.

According to Ilmarinen (2004) the work capability of employees is not solely dependent on these individual resources but to a great extent on the behaviour, attitude and quality of the management of their work organisations. If managers support the personal development of workers (e.g. by means of providing learning opportunities) they have a great influence on work performance as well as on work satisfaction.
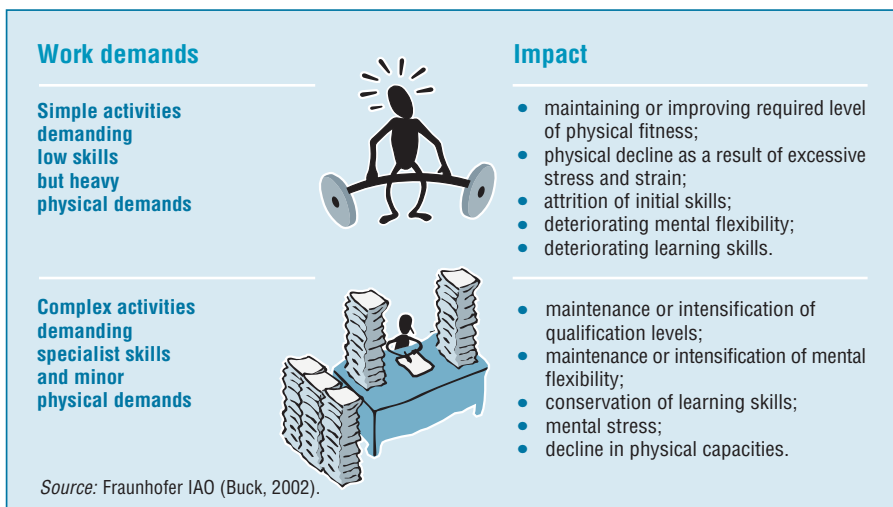
14.2. Ageing-appropriate job design

From the point of view of work science, the contents and organisation of work should be designed in such a way that employees are able to remain active in their jobs throughout their working lives, without suffering physical or mental occupational health risks. Maintaining and developing people's learning abilities should be regarded as a key aspect of individual health and work performance. The following differentiation is important: 'ageing-appropriate' job design has relevance for a person's entire career history, while age-appropriate job design means taking special actions for a particular age group.

Research on ageing in psychology and the social sciences has irrefutably demonstrated that – at least until people reach statutory retirement age – as a rule it is not biological age, as such, which is responsible for performance problems that occur as employees grow older, but rather the long-term impact of stressful and poor working conditions (Wachtler, 2000). It is for this reason that attention must be paid to the actual circumstances in which people work. It is these work conditions which have a crucial influence on

whether employees' productive job performance – and thus their ability to undertake a variety of tasks – is maintained well into old age. These also have an impact on whether workers' qualifications are adapted in line with new requirements, whether they are fostered, and whether the development of compensatory mechanisms to balance out potential age-related changes are introduced.

Figure 2. **The impact of lopsided and long-term work demands**

Work demands

**Simple activities
demanding
low skills
but heavy
physical demands**

**Complex activities
demanding
specialist skills
and minor
physical demands**

Impact

- maintaining or improving required level of physical fitness;
- physical decline as a result of excessive stress and strain;
- attrition of initial skills;
- deteriorating mental flexibility;
- deteriorating learning skills.

- maintenance or intensification of qualification levels;
- maintenance or intensification of mental flexibility;
- conservation of learning skills;
- mental stress;
- decline in physical capacities.

Source: Fraunhofer IAO (Buck, 2002).

If the working capacity of older workers begins to decline, this is often the result of accumulated stress originating from the employee's occupational activities. However, the fact that the performance of older employees tends to suffer in intensely stressful areas of work is far too often regarded as a natural phenomenon or simply ascribed to ageing. In fact, age only becomes a problem if the relationship between work demands and an individual's working capacity are no longer matched. Another reason for physical decline or the burn-out syndrome, or deterioration in mental flexibility and the inability to learn new skills, is the period of time to which workers are subjected to unbalanced, monotonous work causing stress and strains (Pack et al., 1999).

Unbalanced work activities and long-term stress – be it physical or mental – increase the probability of workers suffering from health problems. This is not only true of jobs which require workers to undertake extremely heavy physical work, but is equally applicable to jobs in which workers are forced to

adopt particular postures, e.g. software developers working at computers. The adoption of fixed postures for a long time at the workplace, such as permanent sitting, can also impair job performance and, in the final analysis, can just as easily give rise to back problems as much as heavy lifting.

Work arrangements must take account of the fact that, depending on the type and mix of demands placed on workers, over the medium to long-term, their physical and mental performance capacities can deteriorate significantly. The way to avoid unbalanced stresses is to build systematic changes into workloads rather than reducing overall workloads. The aim must be to achieve a balanced mix of stresses and strains so that people's physical and mental capacities are maintained and enhanced through training. In other words, work should enable people to adopt a number of different postures and movements (e.g. regular changing between activities during which they are required to walk, stand, or sit), as well as switch between different mental or cognitive demands (e.g. between creative, problem-solving tasks and routine activities).

Table 1. **Critical work conditions and corresponding areas of action for an ageing-appropriate job design**

Examples of critical work conditions	Possible areas of action for an ageing-appropriate job design
Repetitive work routines	Job enrichment by changing type, content of work or mixing tasks
Machine-paced work	Making use of buffers, rotation to other work systems
Permanent concentration	Systematic job rotation with changing tasks, sufficient breaks
Forced awkward postures	Ergonomic workplace design, variety in postures
Physically-demanding work	Ergonomic workplace design, variety in tasks
Heat, noise, dust	Ergonomic workplace design, limiting exposure
Night shifts	Limiting exposure
Tight deadlines	Reducing time pressure, increase of staff
Multiple, parallel tasks	Work design, distribution of tasks to more employees

If workers are required to perform work under adverse conditions on a permanent basis, they will almost inevitably encounter health and performance problems as they grow older. That does not necessarily mean

that workers are unable to perform such tasks in general. The more workers are exposed to such critical conditions, the more unlikely it is that they will reach the statutory retirement age. Work structures which make balanced demands on workers promote physical and mental wellbeing (Buck, 2002).

Jobs which place intensive routine loads and stresses on workers (such as working on an assembly line where the pace of work is dictated by machines) will continue to exist in the future. If we take such a realistic point of departure, it becomes quite clear that the ageing-appropriate management of working conditions needs to be understood in the very broadest terms, and cannot simply be limited to technical changes and the observance of occupational safety and health regulations. It is true that it is often necessary for firms to concentrate primarily on ergonomic job design and occupational health; indeed these issues deserve much more attention. Nonetheless, these measures ignore a whole range of loads and stresses to which workers are subjected. If the health-span of employees working under such highly intensive loads and stresses is to be extended for as long as possible, it is essential that entirely new forms of work organisation and task assignment are introduced (Huber, 2002).

Future work must be managed in a way that prevents excessive stresses and strains being placed on people, that promotes the mental and physical performance of employees throughout their (working) lives, and that ensures that the capacities of ageing employees are exploited to a much greater extent than is the case to date.

## 14.3. Further training and lifelong learning

Discussion is currently dominated by calls from business and industry for faster and more direct forms of training and a sufficient supply of younger people possessing qualifications that are in demand. However, as the average age of the workforce rises, firms will be forced to concentrate much more than they have done in the past on the skill potential of middle-aged or older employees. The ageing of the workforce is not only a German phenomenon but a European one [31]. The demographic prospect is an accelerating ageing and shrinking of the workforce (von Nordheim, 2003).

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[31] Further information on population ageing and the ageing of the workforce is provided in the contribution of Descy in Chapter 4.

Studies (Coomans, 2001) have revealed that as workers grow older they are, at present, less likely to take part in further training initiatives. Older people in Germany engage less often in further training than younger people; younger learners also spend more time on further training than older learners. This exacerbates age-specific structural differences, if an assessment of the overall amount of training as such is expanded to include the duration of training courses (BMBF, 2001). The following figure shows that those aged 50-64 years are much less likely to take part in further training than their younger colleagues.

Figure 3. **Levels of participation in continuing vocational training according to age group in Germany**

Source : BMBF, 2005, p. 26.
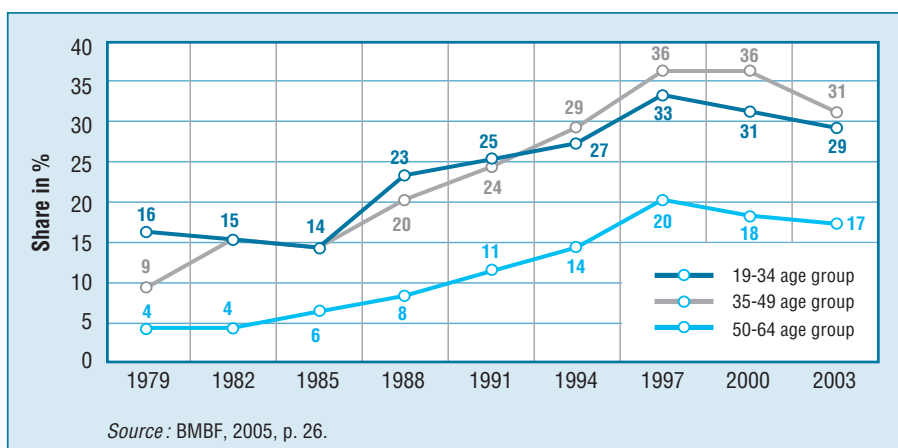
Participation in further or continuing vocational training is also dependant on the level of education, level of qualification and the occupational group one belongs to. Non-manual workers are much more likely to take part in vocational training than manual workers. There are only slight gender differences in the participation rates in Germany (BMBF, 2005).

Given the need for highly-qualified workers and the dramatic rate of technological change, company personnel policy should concentrate on developing the skill potential of all age groups. The concept of lifelong learning will only have positive effects if further training continues to be offered as an established part of companies' personnel development policies (BDA, 2001, p. 20).

No company can afford to abandon the continuing development of its employees aged 40 to 50, especially considering that this age group still has

15 to 25 years of working life before reaching statutory retirement age. Withholding further training from this group will only result in stagnation and the failure of relevant employees to develop their full potential work performance.

Many firms now recognise that their human resources are their most valuable asset. It is equally important that all workers realise that their qualifications, and their continuing development throughout working life, will increase the options available to them in the labour market. Unlike the past, it is unusual nowadays for people to remain in one trade or profession up to retirement. For this reason, it is essential that people realise that after their school education and first period of vocational training, they still have many new learning phases ahead of them throughout their lives.

The concept of lifelong learning means that employees continually keep themselves abreast of new qualification developments in their trade or profession. Phases where people disengage from fresh learning tend to erode learning habits. It is for this reason that the low motivation of older workers for learning is often falsely ascribed to their age.

Discussions about learning organisations and lifelong learning imply that there must be built-in incentives to learn at the workplace. The most important factor inhibiting learning is a work activity about which there is nothing new to learn. Many work systems simply lack inherent incentives for learning. Moreover, the low demands placed on people tend to have a deskilling effect and, in the long term, erode people's learning habits. Initial qualifications are not used and thus become obsolete owing to lack of practice. If the work situation fails to provide permanent incentives to learn, people tend to grow out of the habit of learning as they grow older. Skilled workers deployed in production operations, for example, gradually lose the qualifications they once acquired if they are not given the opportunity to carry out maintenance, quality assurance, or logistical tasks alongside their operative activities. The initial advantage, which their qualifications gave to skilled workers over semi-skilled workers, will be frittered away over time if their skills are not used or continually enhanced.

The learning of older employees will be inferior to those of their younger colleagues if – by virtue of many years of unchanging work demands – older workers are no longer used to learning. Thus, the learning abilities of many older workers first need to be reactivated (Bullinger and Witzgall, 2002). The above paragraphs may be summarised as follows:

(a) regardless of age, people, who are no longer used to learning, need to be given sufficient time to learn. There is a great variety in individuals'

learning tempos and, on the whole, older people learn slowly. For this reason, self-paced learning is a prerequisite;

(b) competitive situations which provoke anxieties must be avoided. People who are not used to learning will often be afraid of learning new things. It is important to verify to what extent the lack of motivation to learn, which is often ascribed to older people, might be an expression of their fear of failure. These fears need to be acknowledged and taken on board;

(c) the learning situation should permit the learner to make links with his or her previous experience. Learning materials which build on existing experience and activities take account of employees' practical interests. It is easier to impart theoretical or abstract material, if what is learnt can be used to solve practical problems and tasks. In this respect, it is preferable to offer task-centred, work-related learning.

New work-related qualifications cannot be taught exclusively in external settings. For older workers in particular, these should be taught on site and integrated with practical applications. A further challenge is learning to abandon obsolete knowledge and inadequate working methods. The theory that 'what was successful in the past cannot be bad today' is of very little relevance in a world of accelerating technological and organisational change. A stubborn refusal to budge from old experiences can block learning processes. In these cases it is important to focus explicitly on the inadequacies and potential errors which long-established working methods may represent. People will only be motivated to engage in active learning if they realise that there is no alternative to acquiring new skills as the example in Box 1 illustrates.

Box 1. **Motivation to learn**

A highly innovative international conglomerate in the IT sector discovered that older employees (in this case engineers) aged 40 years and over, in particular, found it easier to acquire new knowledge because they had experience of several previous technological leaps. These employees realised just how quickly knowledge can become obsolete. On the other hand, many younger employees in the company were not motivated to engage in training because they believed that the knowledge they had brought into the company from their university studies would stand the test of time.

Source: Fraunhofer IAO (Buck et al., 2002).

Recent calls for more intensive continuing training for older employees make sense. However, they do not go far enough. The key issue is to ensure that the idea of lifelong learning is fleshed out with regard to content and methods and becomes a reality for all age groups. The biggest risk for both companies and workers is that extended phases of non-learning will erode ability to learn.

14.4. Managing occupational biographies

Models for managing people's occupational biographies should not be restricted to older workers who are beginning to experience a decline in their working capacity. Rather, management of occupational biographies must begin at the start of people's working lives and even during the initial vocational training phase. Action should be taken at the earliest possible stage to counteract foreseeable declines in skills, health and motivation. This requires a change of attitude among employees and employers alike. The orientation in the future must shift away from just one particular job position, job description, profession/activity towards broader occupation fields. Part of this learning process will also mean severing the link between new occupation fields and better pay or hierarchical promotion. On the contrary, new occupation fields should be expanded and aspired to, even if the new activity only offers an opportunity to get to know a new work setting, acquire new experiences, and expand one's skills and expertise in a new context. From the point of view of companies and workers alike, it becomes possible to facilitate mobility of this type only to the extent that one can guarantee job security and maintain people's standards of living.

It is essential that occupational biographies are managed in a planned way. It is not enough simply to note that there is an increase in patchwork biographies. The timing of demands, stresses and strains in working life must be managed in a way that prevents people suffering premature deleterious health effects, negatively affecting their motivation and performance.

Given that traditional upward career progression will become less viable as a result of flatter hierarchies and an ageing workforce, new ways of changing employee posts in companies must be planned. Greater attention needs to be paid to transferring people horizontally from one activity to another. Varying occupational contexts place different workloads, stresses and demands on people; some pose critical problems for older workers while others are entirely unproblematic. Normally there is plenty of scope within

companies for deploying employees in a way that enables occupational biographies to be managed in line with the process of ageing and addressing the array of work tasks to be undertaken. However, if appropriate jobs are not available, additional job design action will need to be taken (Pack et al., 1999).

In many cases a change in work activity is only possible if alternative career structures are available at the same hierarchical level in a company. Thus, firms which operate flat hierarchies can allow people to switch jobs. Opportunities for changing to a new position, nonetheless, depend on the qualifications that workers hold or are able to offer. It must be pointed out also that people will be motivated to embark on new horizontal careers if such career paths enjoy the requisite prestige in the company and in the community as a whole.

Everybody engaged in gainful employment needs to take stock at certain intervals in their working lives and look for new challenges. The meaning of one's work and the search for new goals tend to become issues in the middle stage of people's occupational biographies. To avoid demotivating workers aged 40+ years, companies have to provide opportunities for both horizontal and vertical careers. Management has to take into account employees' family phases. Opportunities for change in tasks, for sabbaticals and time for further training for occupational reorientation also need to be provided (Figure 4) (for further information on models of occupational development see Regnet, 2004).

Figure 4. **Differentiated paths of occupational development**
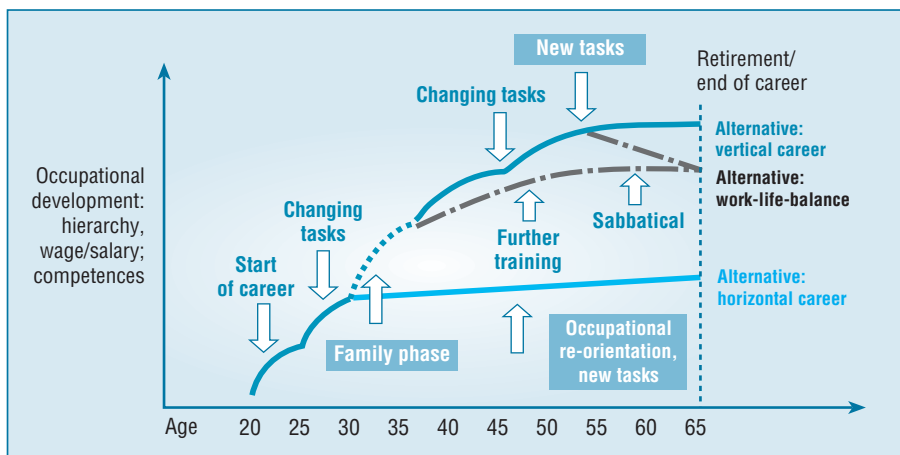
14.5. Conclusions

The problem of placing limits on people's work activity – the phenomenon of workplaces in which employees cannot grow old – is one which affects companies in all sectors. Redeploying personnel within a company to less strenuous jobs is becoming increasingly difficult as many of these jobs have fallen victim to rationalisation processes. This problem has been exacerbated by the ways in which firms organise work, which frequently means that workers remain at the same workplace (jobs) and carry out the same tasks for many years. These workers are not confronted with the need to cope with fresh challenges and take little part in further training programmes offered by employers. As a consequence, their vocational skills become obsolete, their learning skills atrophy, and their flexibility and innovativeness suffer. Job histories of this type make it very difficult to redeploy older workers in the context of restructuring measures because of the lack of their learning skills and flexibility engendered by their lifelong work situations. Given the widespread existence of working environments involving arduous tasks and stressful conditions, the objective must be to reestablish the situation in which the majority of older employees remain at work until they reach the statutory retirement age. This entails broad changes in the world of work.

The most important options to be considered by companies in managing an ageing workforce are as follows:

(a) ageing-appropriate job design and preventive occupational health measures, which enable workers to remain in their jobs up to retirement age;

(b) avoiding unbalanced specialisation; and promoting the development of a range of competences; developing workers' flexibility by ensuring that they carry out a variety of tasks and are subject to changing work demands throughout their careers;

(c) continuous updating of the knowledge base through lifelong learning. Maintaining and continually developing the know-how and skills will grow in importance to the extent that firms are less able to rely on recruiting young people as a source of new knowledge. In the future more employees, and in particular older ones, must be retained in the company through a continuous process of further training. The fact that older people are still underrepresented among those participating in vocational training courses is not only the result of companies' cost-

benefit analysis of investments in training; older workers themselves
have also shown insufficient willingness to engage in continuing training;

(d) supporting the intergenerational transfer of know-how in companies and
systematically exploiting the complementary, age-specific skills of
younger and older workers by setting up age-mixed teams.

These personnel and organisational development measures are essential
to promote innovation within companies operating with ageing workforces.
Innovation ability is not age-determined but is an expression of the work
settings encountered by employees during their working lives. Numerous
examples show that companies operating in markets characterised by a
dynamic knowledge base and rapid innovation can be highly successful,
even if they mainly employ older workers. Several of Germany's traditional
branches of industry, such as the machine tools sector, owe a large part of
their international success to their experience-based 'innovative milieu',
founded on cooperation and exchanges between older experienced workers
and new recruits who bring fresh professional know-how to companies. The
youth-oriented innovation model propagated in computer and software
industries is by no means the only – or even the most appropriate – way
forward.

In the future even more flexibility will be demanded in the world of work,
not only in the period of one's life when workers will be expected to make
their labour available, but also in terms of the stability of career paths. An
increasingly older working age population threatens to collide with a world of
work, which demands patterns of behaviour tailored to younger age groups.
For this reason, the employment problems confronting older workers are
likely to intensify unless counteractive measures are taken in good time and
efforts made to establish ageing-appropriate human resource and work-
related policies.

In the short and medium term, the accelerating pace at which the working
age population is ageing is a much more serious problem than the fact that
it is shrinking. The latter is set to take place at a later date. For the next 15
years or so it will be possible – based on realistic assumptions – to more than
satisfy the demand for labour from existing reserves. These assumptions are
initially based on the assumption that immigration will continue on a scale
roughly approximate to that of the last 10 years. Second, and even more
important, the assumption is based on increased female participation rates
and the cessation of early retirement practices so that they will not apply to
numerically large age groups.

However, actions for improving working and occupational health conditions and facilitating lifelong learning should not be narrowly focused on the older working population. They must encompass all age groups, in particular today's middle-aged generations. Leaving aside humanitarian considerations altogether, the very fact of demographic change demands that we treat our human resources very differently from how we have done so in the past. It would be fair to assume that work demands are likely to continue to increase in such a way that workers will be expected to have higher qualification levels and to cope with even more knowledge-intensive processes. Therefore, additional company investments in further vocational training, for all age groups and at various educational levels, will assume strategic importance in terms of competitiveness. Skill and health-promoting measures must be initiated immediately if the 'population-bulge age groups' are to be kept in employment for a longer period than was the case in the past.

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Learning in a restructured industrial environment: older workers 'displaced' from the British steel sector

Mark Stuart and Robert Perrett

Abstract

This chapter ([32]) charts the experiences of learning among older workers in the context of the restructuring of the UK steel sector, which shed some 7 000 jobs since 2000. Drawing on individual biographies of workers made redundant from the steel industry the chapter examines their learning experiences. To understand these experiences and the potential support mechanisms that can foster positive learning trajectories, our analysis is situated within four potential fields of intervention: the life context; everyday working life; the period of direct displacement; the time following displacement. The importance of developing change competences throughout working life is stressed.

15.1. Introduction

This chapter explores the experiences of learning among older workers 'displaced' as a consequence of the restructuring of the British steel sector. Since 2000, more than 7 000 jobs have been lost in the sector and many more job losses are forecast. Historically, redundancies from the industry were managed through processes of voluntary severance (so called soft redundancy) whereby those near to retirement or over 50 years of age

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would be paid enhanced redundancy packages (at one time supported by the European Coal and Steel Treaty provisions) to leave their jobs. As such workers have been 'stripped out' of the industry, and the forces of international competition have tightened, the age profile has come down, although displacement disproportionately affects those aged over 45 years. The lightly regulated British employment environment means that many workers have had little voice in the corporate decision-making processes relating to programmes of redundancy, no guarantee of support following redundancy and, in specific cases of plant closure, have lost their company pensions upon redundancy.

For more and more workers, redundancy is no longer synonymous with retirement. The question of employability for such workers, and the extent to which they are able to access opportunities to learn and enhance their employability, has become a concern (Wallis and Stuart, 2004). Notably, older workers, on average, have fewer recognised skills and qualifications than younger workers and are more than twice as likely to have no formal qualifications at all (Humphrey et al., 2003). In early 2001 the British Labour government set up the Age Advisory Group incorporating representatives from many concerned parties including the Confederation of British Industry and the Trades Union Congress, to provide guidance on implementing relevant EU legislation and to assess the potential impact upon employers. Further, the Age Positive campaign was initiated to show to employers the benefits of employing and training older workers and to encourage them not to discriminate against older workers in respect of recruitment, training and retention. At a more specific level, a series of initiatives designed to facilitate pathways to work for older workers have been introduced. For example, the New Deal 50 plus programme, providing tailored help to older workers, including advice, training, financial support and tax credits, has supported around 15 000 job starts among older workers between April 2000 and March 2005 (DWP, 2005). Trade unions have also been encouraged to promote adult learning and are viewed as important conduits for advice on learning, given the fact that adults, particularly older workers, often wish to avoid drawing attention to their skills gaps and do not wish to approach an employer about such concerns (DfES, 2003).

Against this backdrop, this chapter examines the factors that have contributed, in either a positive or negative capacity, to the employability of redundant steelworkers and their enthusiasm to engage in learning. Following Hillage and Pollard (1998, p. 11), we define employability as: 'the capacity to move self-sufficiently within the labour market to realise potential

through sustained employment'. Drawing from a small sample of detailed individual biographies, we consider the factors that have contributed to individuals' abilities to cope with the uncertainties posed by redundancy and their capacities to embark on new employment trajectories.

The chapter is organised into four further sections. Section 15.2 briefly outlines the recent wave of restructuring that has taken place in the British steel industry and the implications of this for longstanding workers and their learning experiences. In Section 15.3 we explain the methodological procedure deployed in our study and present a summary of our respondents. In Section 15.4 we present our main empirical findings. Finally, we present a short conclusion.

15.2. Restructuring the British steel industry and the implications for learning

The British steel industry was subject to a number of waves of nationalisation and privatisation during the 20th century, typically against a background debate on the relative efficiency and technical (un)sophistication of the industry (Blyton, 1993). In an effort to rationalise and modernise the industry, the Labour government nationalised a large proportion of the industry in 1967. The resultant British Steel Corporation accounted for 90 % of all UK steel making capacity. By the late 1970s the industry was facing economic crisis and overcapacity in international markets, prompting the British Steel Corporation to launch the Slimline and subsequent Survival restructuring plans. Consequently, some 100 000 jobs were lost in the industry between 1979 and 1983 (Blyton, 1993), a figure unprecedented within the European steel industry. Restructuring continued apace throughout the 1980s and 1990s, as British steel sought to respond to changing economic, political (i.e. privatisation) and management contexts. In October 1999, British Steel merged with the Dutch company Koninklijke Hoogovens to form the fourth largest steel company in the world, Corus. This merger saw large scale restructuring in UK plants, with 6 000 job losses, and a number of plant closures, announced in 2001. In April 2003, Corus announced a further 1 150 UK job losses, with the promise of more to come.

Restructuring has had major implications for the learning experiences of steelworkers. For those remaining within the industry, there has been increased emphasis on competence development by steel employers as part

of the drive to establish multi-skilled teams and enhanced levels of operational and labour flexibility (Bacon and Blyton, 2003; Blyton and Bacon, 1997; Greenwood and Stuart, 2004; and also Fuller and Unwin, in Chapter 17). For those leaving the industry and in need of further employment, lifelong learning is increasingly important if they are to secure employability in the labour market beyond steel. The acquisition of certified qualifications, and the accreditation of extant skills, is particularly important given evidence that the unqualified are disadvantaged in the labour market. Yet, a study in the late 1990s found that 45 % of steel industry employees are without qualifications (Fuller and Unwin, 1999). Many steelworkers entered the industry with poor experiences at school and little interest in further education and training, something that mattered relatively little while employed in the industry. And many of those displaced have worked in the industry for long periods of time (typically over 25 years). For those workers over 55, redundancy packages and enhanced pension provisions mean that redundancy is essentially synonymous with retirement, although the extent to which such financial packages are able to sustain an individual through the rest of their life is debatable. However, an increasing number of older redundant workers are faced with the prospect of having to find new employment. The prospect of finding similar manufacturing jobs, with equivalents rates of pay (production workers in the steel industry were typically not classified as skilled but they were relatively well remunerated) is remote. A key question, then, is to what extent such workers are able to access learning opportunities, to improve their prospects in the external labour market, and what support structures exist to facilitate and encourage this?

In response to the most recent wave of steel restructuring, the main production union in the industry, the Iron and Steel Trades Confederation ([33]), has played a key role in supporting redundant workers regarding learning opportunities and new employment. Historically, the Iron and Steel Trades Confederation had focused its learning activities on standard trade union education and activist training, yet the severity of the late 1990s restructuring programme prompted a strategic reappraisal (Wallis and Stuart, 2004). There was a growing realisation within the union of the need for basic skills training and accredited courses to enable ordinary members employed within the sector to develop transferable skills to increase their employability. To facilitate this, the union established a training company, Steel Partnership Training, which has subsequently developed a

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[33] The Iron and Steel Trades Confederation recently renamed itself Community.

number of activities and learning opportunities to assist workers in the immediate aftermath of redundancy.

15.3. The research approach

The methodological approach of our study was exploratory and qualitative, as we were concerned with examining the 'processes by which events unfold' and understanding the 'complex social interactions' shaping workers' experiences of undertaking and accessing learning opportunities post redundancy (Kitay and Callus, 1998, p. 104). Given these concerns, we took the individual as our unit of analysis and adopted a biographical approach to the research, whereby individuals' post-redundancy experiences were situated in relation to their learning and training histories, working lives and family lives (i.e. their life histories) (Chamberlayne et al., 2002).

Interviewing workers who have recently been made redundant is naturally a sensitive process and accessing a sample for research purposes is not straightforward. To assist with this, the research team were granted access to, and the support of, the offices of Steel Partnership Training (SPT). SPT has established offices close to all the main steel plants in Britain affected by redundancy and has appointed staff (typically ex-steelworkers themselves) to offer counselling, training opportunities and job search facilities to redundant steelworkers and their partners. All redundant workers are encouraged to drop into SPT offices for a discussion of their options, and SPT advisors regularly telephone those made redundant to encourage them to consider SPT services. These services include a basic suite of courses, in informational technology (such as the European computer diving licence), forklift driving and health and safety, that SPT has brokered with local educational and training providers. SPT aim to register all redundant workers onto these courses as soon as possible following redundancy, not only to help enhance the qualifications of these workers, but also to get them doing something that has a routine and purpose and hopefully gives them time to reflect on what they want to do next. To this end, SPT has acquired European Social Funds to pay for any education and training that redundant workers and their partners wish to undertake.

SPT had established a data set of all steelworkers made redundant in the UK since 2001 and it is from this data set that we derived our research sample. This data set included information on each worker in terms of: past employment and training received; aspirations for the future; support

requirements; training needs and desires; training undertaken since redundancy; employment following redundancy; and contact information. From this, we derived a selective sample of workers (Miller, 2000, p. 76), the key consideration being the 'potential of each case to aid us in developing theoretical insights into the area of social life being studied' (Taylor and Bogdan, 1984, pp. 83-84).

Interviewees were contacted initially by telephone and the aims of the research outlined. All interviewees approached expressed an interest in the project and a desire to tell their story. In total, 15 biographies of workers aged over 45 were undertaken. Of these, 13 involved 2 separate interviews, and we also interviewed 2 partners. Interviews typically lasted between two and four hours, and all were taped-recorded and subsequently transcribed. The interviews were undertaken at SPT offices in six localities across England and Wales. The workers interviewed had previously worked at four Corus plants and, in one case, various small steel concerns. In one plant closure workers were given no advance warning of their redundancy (they heard about it by letter or on the radio), received no redundancy payments and lost their pensions. Our understanding of the redundancy experience was also supported by a further research project that included shorter interviews with around 150 redundant workers, trade officials, representatives of economic agencies and policy-makers in the Welsh steel districts. Our analysis of the biographical transcripts followed a grounded theory approach, to situate and understand our findings against a broader set of conceptual themes.

15.4. Research findings

The employment and educational trajectories of our respondents post-redundancy were varied. Just three were unemployed at the time of the interviews. The rest were either in employment or full-time education. Some had found self-employment, as a safety officer, landscape gardener or plumber and gas fitter, while others were employed as lorry drivers or for contracting firms servicing the steel industry. One had embarked on a full-time university degree course, at the age of 49, to become a Welsh language teacher. Three of the sample that had a history of trade union activism were employed as training advisors and counsellors for SPT. All but three had availed themselves of SPT's services following their redundancy.

15.4.1. Personal experiences of learning post-redundancy

The opportunity to undertake further education and training was regarded positively by all our respondents. Nonetheless, many explained that they had been apprehensive about doing so. Many had received only limited (or no) training since leaving school over 20 or more years ago, and many had negative experiences of schooling itself. This was particularly the case for those that had embarked on formal trade-related courses or non-vocational courses at college or university. These claimed to have exhibited a heightened level of apprehension and embarrassment prior to attending their courses, given that it had been so long since they had been in a classroom and they had forgotten how to learn in such an environment. These individuals believed that they were too old, not good enough and that they would fail. Norman (names have been changed to preserve anonymity), who had been out of education for 25 years, recalled that:

> 'I was very afraid. I'll never forget what the most traumatic experience for me was; I knocked on the door, I opened the door and I see all these faces half my age, looking at me. I thought to myself, "Oh my God, what am I doing here?" And I almost turned around, that's what I felt. I thought, oh, they're all bound to be better than me, the young whiz kids'.

This concern did not, of course, just apply to engaging in learning activity. Many interviewees commented that, after spending most of their working lives in the steel industry, having never claimed benefits or sought alternative employment or additional training, they were scared, directionless and unsure of entitlement, what they should be doing or where they should go to obtain support. According to Mickey:

> 'Many lads had spent their whole lives there (steelworks). They didn't know where to go or what to do when they found themselves without a job'.

Carter confirmed that:

> 'A lot of people obviously worked all their lives, never been on the dole or anything in their lives. They just didn't know what to do, where to go, you know, they didn't even know where their job centre was and they didn't know anything about signing on'.

How people reacted to this personal crisis and sought to develop employment and learning trajectories post-redundancy varied. Some genuinely saw the redundancy as an opportunity to change their lives and do something radically different; embarking on learning, no matter how

challenging or daunting this seemed, was one potential avenue. Others had less of an idea what to do. In some cases the well developed identity of being a steelworker made them resistant to alternative employment options, and they were unwilling to look for, or undertake learning that would lead to, in their view, lower paid or degrading work (for a more detailed discussion, see MacKenzie et al., forthcoming). For example, Mickey and Charlie respectively stated:

> 'There is a physical limit to what I can do and I'm not going to work in Tesco's for pennies and spend my days doing degrading work'.

> 'They're (redundant steelworkers) going into these factories and little places or whatever, warehouses, and they've got the team leader there, some young kid of 21, 22 telling them what to do. Now, that bites a bit […] The actual money that you get is demeaning. I've got a bit of pride […] I'd rather go without and try to live with what I've got than go down that road'.

One of the key findings to emerge from the study was the extent to which previous experiences of change conditioned the likely individual response to redundancy. Those that had a prior history of change, both in terms of their activities at work or through moving to different jobs, were more open to options following redundancy and tended to be more positive about the future. Prior experiences of learning that were unrelated to work or broader social activities (and the networks of social capital that this created) outside of work were also important factors. What such findings tell us is that looking at the situation and experiences of individuals post-redundancy is not the whole story; nor is their age. While all our sample of older workers were apprehensive and concerned about the future, and to some extent there was a 'fear of change'; how individuals responded to their situation and sought to develop their post-redundancy (and steel) employment and learning trajectories was influenced by their life course experiences both at and beyond the workplace.

To understand this, we have attempted to delineate our respondents' experiences in relation to several domains, all of which have a bearing on their post-redundancy experiences. A number of domains relate explicitly to the social situations created and institutionalised around the redundancy experience itself, but other domains are broader and relate to their wider life and work experiences. Following Bourdieu (1998), we understand these domains as fields, whereby actors can accumulate and appropriate experience and various forms of capital that may shape how their opportunities and material position may develop. To the extent that these

domains constitute important spheres through which support structures and policy interventions can be created and elaborated, we consider four possible 'fields of intervention', related to the life context, 'everyday' working life, the period of direct displacement, and the time following displacement.

15.4.2. **'Life context' facilitating employability**

For the purpose of this analysis, the life context field has been tightly defined and incorporates influences on employability and a propensity to engage in lifelong learning that do not relate to 'everyday' working life or the periods immediately prior or subsequent to redundancy. By definition this includes the periods before employment, out of employment or non-work-related activities as well as more personal influences such as relationships, family and personal attributes.

Training and education play a prominent role within the life context field. Formal academic qualifications obtained from school generated a positive influence on employability throughout life. Those who achieved qualifications from school were most likely to have had a positive experience of schooling and were more disposed to additional learning throughout their lives. Similarly, individuals who gained vocational education, in particular formal apprenticeships, improved employability and more successfully dealt with redundancy. Even when individuals gained few or no qualifications from school, or described themselves as 'not academically minded', obtaining vocational qualifications early on in life (after school) resulted in employment less associated with production and them acquiring skills more easily transferable to other sectors and workplaces.

Another area in which skills and education feature within the life context field is training gained outside of the workplace and not related to the job. A distinction is often made between workplace training, possibly designed to improve productivity, and training separate from the workplace, for example evening classes or college courses, undertaken as a hobby or for personal accomplishment or gratification. Such training, although not specifically pursued for this reason, can improve employability and also the general appetite that an individual has to engage in further learning. This was particularly the case with Norman, who, following redundancy, has trained to become a Welsh language teacher. The fact he did this, despite many doubts about whether he was too old, was influenced by a history of undertaking adult education and evening classes. He claimed that such courses made him feel like he was more than just a 'steelworker' and that he could accomplish things on his own. For example, Norman undertook a course in

business German on day release from the steelworks in the early 1990s. This was followed in 1996 by a Welsh language course at a local college three evenings a week.

15.4.3. 'Everyday working life' facilitating employability

This covers the positive and negative influences on employability generated through the course of an individual's employment within a workplace environment. It excludes, however, the periods immediately prior and subsequent to redundancy. It is often taken for granted that training and employability are intrinsically linked, yet this is often not the case, particularly in respect of workplace training. Additional training had been widespread at each of the research sites as part of a wider restructuring scheme aimed at introducing teamworking. However, restructuring incorporated considerable manpower reductions, resulting in little or no cover for individuals to leave 'the line' to gain these additional skills. This undermined the basic principles of autonomy and multi-skilling underlying teamwork. As Fredrick explained:

> 'If you had a problem there was always someone there to help you, but with the latter system [teamworking] […] we didn't have the manpower to do that. Once you were shown how to do your job you were left to do it, there was no one to assist you if something went wrong. My team lost two men […] those were the ones who normally used to facilitate training'.

Many of those who did receive the training described it as unstructured, on-the-job and often inadequate, which ultimately did little to improve their employability. Further, teamworking actually acted as a disincentive to undertake additional training. The harmonisation of pay meant that taking on additional responsibilities or becoming skilled in a larger number of tasks would not result in greater financial reward.

At a broader level, much of the training received by employees during their working life was described as industry- or company-specific and therefore of little value to other companies following redundancy. Even skills that were supposedly identified as transferable to other industries, such as forklift, crane and truck driving, were often in practice not so, as qualifications/ licenses were not nationally recognised and were therefore only valid at the specific steelworks where the individual was employed. Only if these individuals retrained and gained formal, national qualifications would these skills be recognised by employers within the local economy. As Carter and Thomas respectively explained:

'They said that the truck driving, and licenses for the forklift trucks, they were [nationally] recognised, but when we were made redundant they weren't […] All the in-house sort of stuff was not nationally recognised […] you would have to retrain and get your national licence'.

'I undertook very little formal training over the course of my working life at Corus, most learning had been undertaken on the job […]. None of the training or qualifications I received was formally recognised nor would they be recognised by other workplaces'.

At a more general level, an individual's ability to cope with, and the significance attached to, redundancy was influenced by their past experiences of the labour market. For some, enduring redundancy or numerous job changes in the past improved their propensity to cope with change or even made change a familiar part of life. Such individuals, who had experienced redundancy and change in the past, appeared to be most optimistic in respect of their future following redundancy from the steel industry. By contrast, living under the threat of redundancy for a substantial period meant that employees were less able to predict or prepare for redundancy or change. The continued threat of redundancy resulted in individuals becoming 'desensitised' and attaching less significance to the threat. Moreover, many individuals had lived under the threat of closure and redundancy for most of their working lives and so believed that the company would always survive or was in some way invincible, even when faced with an economic down-turn.

15.4.4. The 'period of direct displacement' facilitating employability following the 'announcement of redundancy'

Direct displacement spans the shortest time period and is defined as the time from announcement of redundancy to actual loss of employment. This period represents an employee's final opportunity to improve employability or to seek support, or engage in learning, prior to redundancy. The research revealed that individuals who responded earliest to, and planned for, redundancy significantly improved their chances of finding alternative employment and spending least time out of work. Such planning included applying for alternative employment, becoming self-employed, enrolling on training courses, evening classes, or seeking advice and support from local agencies prior to redundancy. For example Thomas stated that:

> 'I took a very proactive approach to my predicament. As soon as I knew the redundancy was inevitable […] I compiled my CV and started searching the newspapers for jobs, applying for many of them, including the police'.

Moreover, individuals who had knowledge of shortages in the national and local labour markets, and took steps to become qualified in these areas, significantly improved their employability. For example, anticipating redundancy, Carter identified a national shortage of gas fitters and plumbers and so decided to embark on a new career:

> 'When there was the nationally advertised shortage […] I thought, "well, a career's a career". You will get qualifications, like the old apprenticeship, the NVQ now. So I thought, "well, have a go at it and see if you can do it". There was a shortage so there had to be money to be made'.

Conversely, employees with little knowledge of the labour market, or those who did not plan their redundancy, were left with the fewest employment options following redundancy.

As the majority of workers were still employed full-time over the period of direct displacement, advice and support received at the workplace was vitally important. At some Corus sites 'work fairs' were held, bringing together support groups, benefit advisors and employment agencies to offer advice and guidance prior to redundancy. Most interviewees agreed that bringing such agencies together at one centralised location was of great benefit, particularly as most had never been out of employment and were unsure as to what support was available, what they were entitled to or where they should go to get it. Yet, such work fairs were not implemented at every site and, for some interviewees, support at workplace level was non-existent.

Of particular concern was the lack of access to training and learning opportunities over this period. Following redundancy, many employees did not undertake retraining as they could not afford it in terms of lost income. Training prior to redundancy was, therefore, seen as of paramount importance. In this context, the activities of SPT were widely praised, yet the services and opportunities facilitated by SPT were, as a funding condition, only available following redundancy. This left SPT in a 'fire-fighting' situation whereby they were addressing the symptoms rather than treating the cause at an early stage. Indeed, an attempt by SPT and the Iron and Steel Trades Confederation steel union to establish a training agreement with Corus to assist in training workers prior to being made redundant was explicitly rejected by the company. Many of our sample believed that the employer

should have allowed time-off over the period of direct displacement for individuals to gain additional training and skills to aid their transition from the steel industry.

15.4.5. The time following displacement: learning, employability and new employment trajectories 'post redundancy'

Here we refer specifically to the period immediately following redundancy. This incorporates support mechanisms and relationships, as well as other influences that impact on an individual's ability to cope with transition or to succeed (or fail) following redundancy. An individual's psychological interpretation of redundancy appeared to influence their ability to cope with the change and the degree of success they attributed to their transition from the steel industry. Those who interpreted the redundancy as a 'blessing in disguise' or as a second chance to pursue 'more gratifying' employment were most content and most successfully coped with redundancy, even where their financial circumstances worsened substantially. We have already considered particular experiences in more detail, and action at this level was shaped by experiences in our three other fields. We have also explained that SPT, as an example of community-based unionism, played a prominent role in providing support for employees post redundancy. Importantly, they acted as a central point of reference for accessing a coalition of agencies that could support the redundancy experience, including careers advisors, job centres, educational and training institutes and more general advice on finance. Not surprisingly, of all the agencies offering potential support, SPT received, by far, the most praise. For example, as Russell and Fredrick noted respectively:

'SPT is from the educational side and tries to help people in that way and I think by and large it works well […] it helps enhance people's skills so at the end of the day either young or old can get meaningful employment or something satisfactory in life'.

'So we came down there to have a word with them (SPT), they had a set up, everything in place for us, there was the Steel Partners themselves, there was the DHSS, debt counselling advisors there, there was job possibilities, techniques […] Elwa were there for advice on jobs and stuff and training. That was all put together in a package and we went down there, seeing what's available'.

15.5. Concluding remarks

Against a backdrop of industrial decline, this chapter has explored the experiences of older workers made redundant in the steel industry in the UK. Our sample had experienced long periods of tenure in a single industry; the prospect of finding new employment or retraining was daunting. Age was seen as a barrier to learning, and many explained how embarrassed and apprehensive they felt about undertaking learning, particularly given the fact that many had poor experiences of schooling and little experience of training and learning post-schooling. There was also a resistance among some to employment, and retraining, in sectors of the economy in which they would be paid less than the steel industry.

Nonetheless, this is not to suggest that alternative futures are not possible following redundancy, or that older workers have little to offer or have no incentives to embark on new trajectories. Our findings reveal some inspiring cases where individuals moved from the steel industry into a wide variety of employment and education scenarios. Many factors can influence this process of transition. The support structures that exist to assist and guide workers after they have been made redundant are clearly important, but potential fields of intervention are broader than this. Our chapter has only briefly elaborated on four such fields: 'the life context', 'everyday working life', 'the period of direct displacement' and 'the time following displacement'. Most significantly, the ability to cope with redundancy, and essentially change direction, is itself shaped by a history of change in an individual's personal and working life.

All too often, institutions of education and working life limit the experiences of change for many working people. Certainly, few of our older workers had extensive and positive experiences of learning and training at the workplace, or positive experiences of new forms of work organisation, such as teamworking. Arguably a more learning-conducive working environment (Skule and Reichborn, 2002), where work organisation and job rotation act as positive forces for change and enrichment, would equip workers far more effectively to engage with personal crises such as redundancy. How this is to be achieved is a matter for further debate and research. But, trade unions could play an important role here.

Our research also identified an innovative example of trade union activity, centred on a community-based training and advisory function, which has much to recommend it. Such activity is sensitive to the demands and requirements of specific types of workers, and particularly those older

workers with long employment histories in the steel industry. Yet, as of now, it has not proved effective in connecting with and shaping planning strategies prior to the announcement of redundancies. Encouraging employers to support the working and learning lives of their workers on a continuing basis, and in a way that helps them navigate the uncertainty of redundancy, is likely to remain a major challenge. Of course, to understand how policy and practice may assist the needs of older workers, we also need to listen to the voices of the workers themselves.

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The impact of a learning incentive measure on older workers

Albert Renkema and Max van der Kamp

Abstract

This chapter is based on a quasi-experimental study on the impact of 'individual learning accounts' (ILAs) ([34]) on learning intention and learning culture at the work(shop) floor level ([35]). The study focused on the impact of ILAs on older employees in two sectors: elderly care and small and medium sized enterprises (SMEs) in technological installation. The point of departure for this impact measurement is Ajzen's theory of planned behaviour. Differences in the effect of ILAs on learning intention and learning culture were found between both sectors. In the technological installation companies, ILAs had the greatest effect on the learning intention of older employees. In elderly care organisations, ILAs had most effect on the informal learning culture among employees. These differences are related to factors such as gender, organisation size, organisation structure and strategic training policy. This chapter outlines the ways in which these factors made an impact.

16.1. Introduction

Like many European countries, the Netherlands has an ageing labour population. Until recently, legal retirement settlements and early retirement have led to the exit of many older workers, but, because of shortages in the labour market and the high cost of exit from the labour market, older workers are now encouraged to stay longer in employment. In this respect there is much political debate on issues such as abolishing early pensions and

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([34]) An ILA is a savings account for employees and job-seekers to be used for training.

([35]) The term 'work(shop) floor' refers to the direct work environment in which individuals interact with colleagues and immediate supervisors.

increasing the age of retirement (now 65). It seems inevitable that older workers will have to contribute longer than in recent years to the (knowledge) economy. Because obsolescence of knowledge and skills takes place quickly, different forms of formal and informal learning are necessary. However, the participation of older workers in educational activities is lower than that of younger workers (Van der Kamp and Scheeren, 1997) especially for lower educated (older) workers. For many years they were not encouraged by their employers to take part in training; in addition, they experience several barriers to educational participation such as a lack of self-confidence, lack of money and suitable provisions. As Descy illustrates in this book, the limited educational participation of lower educated adults at all ages applies to other European countries as well.

So, how can participation in educational activities among lower educated older workers be increased? While, in the past, adult education occurred mainly on a voluntarily basis, recently we have seen more and more variants of persuasion and obligation. An interesting strategy – which is not free of engagement, but less harsh than obligation – is the use of financial incentives to encourage educational participation.

In the framework of lifelong learning policies in the Netherlands, attempts to stimulate participation in educational activities have taken the form of experiments with 'individual learning accounts' (ILAs). The concept of ILAs has been adopted from the UK, where ILAs were successful in many respects but seemed to be susceptible to fraud (Graham et al., 2002). The idea of ILAs is to stimulate the demand side of lifelong learning and to make the individual more autonomous and responsible for his or her own choices regarding employability and lifelong learning. In his contribution to this book, Hake points out that Dutch experiments with ILAs enhanced low qualified workers' awareness of their personal development and thus enabled them to acquire more control of their learning careers. However, it is clear that, within the context of labour organisations, other variables such as learning culture play a major role. In this chapter we explore the effects of ILAs on the learning intention of older workers and on the learning culture at the work(shop) floor level. This chapter is based on an evaluation study of the Dutch experiments with ILAs by Renkema (Renkema, 2002; Renkema and Van der Kamp, 2003; see also Geertsma et al., 2004). The study covered the full age range from 16 to 65, with special analysis of workers older than 45 years.

The conceptual framework of the study is discussed below, along with the theory of planned behaviour developed by Ajzen (1991). Our main

hypothesis is that ILAs will have a positive effect on learning intention and learning culture. We formulate four derivative hypotheses before studying the methodology (Section 16.3). Two studies were conducted: one in the technical installation sector and one in elderly care organisations. In the conclusion and discussion (Sections 16.4 and 16.5) we briefly reflect on the hypotheses of this study and put forward some considerations for policy-makers.

16.2. Conceptual framework

In the study we examined the effects of ILAs on the intention to participate voluntarily in learning and development activities. ILAs can affect learning intention in three ways. First, they enhance the individual worker's freedom of choice with respect to training and development. Second, workers receive personal needs assessment and guidance from the manager or training advisor at personal development plan meetings. These two elements play a role within the framework of employee-driven human resource development activities (Van der Waals, 2001; Van der Waals et al., 2002) and employee-centred career development in organisations (Kidd, 1996). Third, workers get the opportunity to experience training and learning in the framework of ILAs. These three ways in which ILAs can influence individuals'learning intentions are operationalised in intervention variables.

Intentions to participate in learning are likely to be determined by individual dispositions such as self efficacy and positive attitudes towards learning and development activities (Maurer, 2001). To study the effects of ILAs on intention we need a comprehensive model that comprises these dispositional variables. Therefore, we applied the theory of planned behaviour as the point of departure for the effect evaluation of ILAs (Ajzen, 1991). Intention, according to Ajzen, is influenced by three behavioural determinants: attitude, subjective norm, and perceived behavioural control (Figure 1). Attitude refers, on the one hand, to certain beliefs about how much 'fun' or how interesting learning and engaging in training activities is according to the individual (affective attitude) and, on the other hand, to the degree to which the individual regards learning as useful or profitable (instrumental attitude). The subjective norm is determined by perceived opinions about learning and training of referents that are important to the individual, such as family and friends. Perceived behavioural control relates to the individual's beliefs about his or her capability or competence to engage in learning activities and about

his or her potential to bring these activities to a satisfactory end. This behavioural determinant is similar to the term self-efficacy (Bandura, 1977; 1997). In this study we assume that the intervention variable 'freedom of choice' will have a positive influence on attitude, perceived behavioural control and intention (hypothesis 1). Further, we hypothesise that positive experiences with training and learning with ILAs will have a positive effect on the intention to engage in learning activities in the future (hypothesis 2).

Figure 1. **The research model**
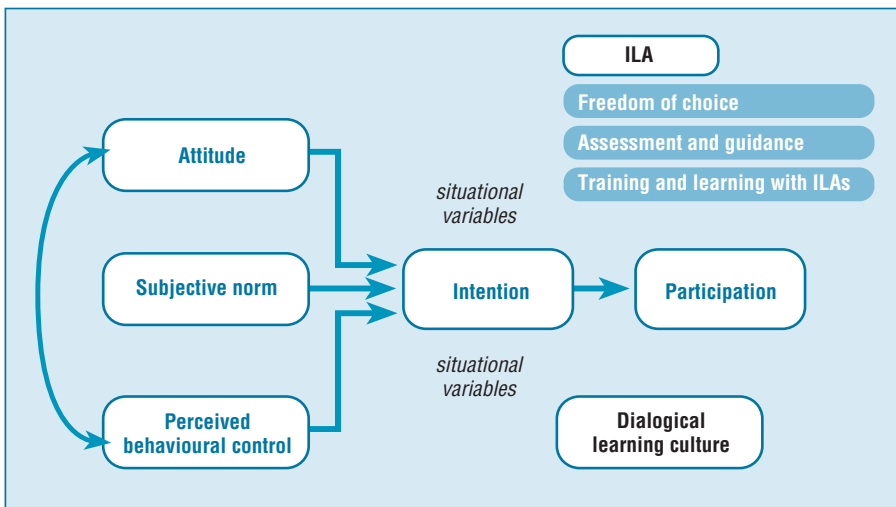
Further, intention to participate and its behavioural determinants are generated from a background of individual educational strategies (Van Damme, 2000). Educational strategies relate to the way in which adults take strategic decisions with respect to learning and education and they are formed by significant experiences in one's life course. Antikainen (1998) for instance, analysed the way in which individual adults manage and give meaning to learning and education in a rapidly changing society in the context of individual biographies. He elaborated on the way in which significant learning experiences influence the identity of people and shape individual life courses. Although we recognise the significance of individual biographies in decision-making on learning and education, we chose the theory of planned behaviour as a conceptual framework. This theory is well suited to this study and is used heuristically to pinpoint the effects of an instrument such as ILAs on the intention to engage in learning activities.

Apart from dispositional determinants, external factors such as size, structure and culture of the company also have an effect. We focus on the direct work environment of the individual by analysing its supportiveness to people to engage in formal learning activities. Individual communication between worker and employer about job performance and training and development needs is likely to be important in supporting the adaptive behaviour of older workers through positively influencing behavioural determinants such as self-efficacy and stimulating them to participate in learning and development activities (Maurer and Rafuse, 2001; Maurer, 2001). In a prior study on a voucher experiment in technical installation-enterprises, Meijers (2003) speaks of enhancing the learning dialogue at the work(shop) floor level. On the basis of this study we developed the concept 'dialogical learning culture': the rate at which the respondent perceives whether he or she is appreciated by the employer and colleagues as a person and as a professional and whether there is room on the work(shop) floor to discuss personal and professional development. We assume that the intervention 'variable assessment' and 'guidance' in the framework of ILAs will have a positive influence on dialogical learning culture (hypothesis 3). Finally, in accordance with Maurer, we hypothesise that the perception of 'dialogical learning culture' will have a positive effect on attitude and perceived behavioural control (hypothesis 4).

16.3. Design and methodology

In this section we expound on the design and methodology employed in the study to measure the effects of ILAs on the variables just described. Emphasis is placed on workers in the older age group. First we discuss the type of research conducted and the research design. Then we compare the two studies with respect to relevant characteristics, paying attention to the differences in execution of the ILAs experiment in the two companies. Finally, we discuss the methods of data collection and analysis. Although this study mainly consisted of quantitative methods of data collection and analysis, we also conducted interviews with respondents.

16.3.1. Design

Two different sampling methods were used for the two experiments. Both studies started when the actual experiments with ILAs were already running and respondents were already – not randomly – assigned to the experiment.

That is why both studies are constructed on the basis of a quasi-experimental design. In this study, the participants in the experiment form the experiment group. We constructed a control group in both sectors to resemble the experiment group with respect to variables such as age and function levels. The control groups in the elderly care study were constructed within the same organisations participating in the experiment but our focus on small technical installation companies meant we could not construct control groups within the same organisations that participated in the experiment. Therefore, we selected companies that matched the participating companies with respect to variables such as company size, company structure and corporate training policy.

In this study we conducted two measurement periods (Figure 2). The first measurement took place six months after the initial meetings - between worker and training advisor in the elderly care organisations, and worker and employer in the SMEs - about the ILAs. Immediately after the experiments with ILAs a second measurement was conducted. These measurements consisted of closed questionnaire surveys and in-depth interviews with employers and workers in both sectors. Because the control groups in the technical installation sector were constructed independently from the experiment with ILAs and we, therefore, did not expect these companies to change their training policy dramatically during the experiment, we approached these companies once.

Figure 2. **Research design**

M1 = first measurement
M2 = second measurement and in-depth interviews
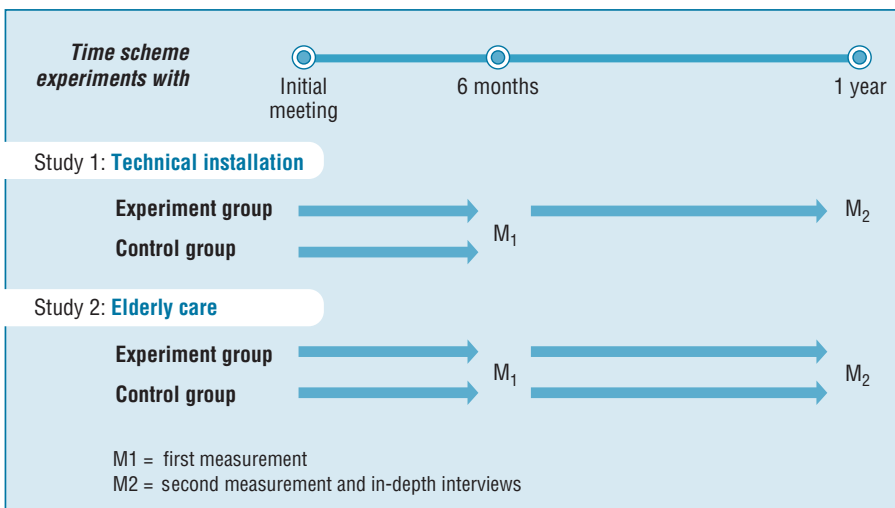
16.3.2. Data description

The main difference between the two types of organisations is in their corporate training policy. Before the experiment with ILAs, the elderly care organisations regularly organised off-the-job and on-the-job training for workers. All five participating organisations had a fully outlined and operative training policy, while in the technical installation companies a purely economic short term perspective determined the interaction between the organisation and individual workers. The elderly care organisations were much larger in terms of total number of employees and a training advice infrastructure was present in the form of personnel and training advisors. However, supervisors do not have a crucial role in training policies.

The experiments in the technical installation sector were launched by the sector training fund to enhance long-term training policy, especially in SMEs. In this company the employer (who is also the manager and immediate supervisor) is responsible for personnel and training policy. Another important difference between the two sectors is that the technical installation companies employ mainly male workers and elderly care organisations mainly women.

The respondents participating in this study differed with respect to personal characteristics such as age, prior participation in training activities and function levels. The function levels are derived from the category level of the national qualification framework in the Netherlands. The first two levels refer to 'assistant-undergoing-training' and 'assistant' functions. Workers at the third level operate autonomously as a mechanic, installer or nurse. Most respondents in both the control group and the experiment group had a third level position. Fourth level positions entail coordinating functions relating to foremen, planners and coordinators. Tables 1a and 1b show the distribution of the age groups within the two ILA experiments. The distribution is fairly even, although in the elderly care sector older workers are overrepresented in the experiment group.

Table 1a. **Distribution of age categories for technical installation workers**

Age categories	Experiment		Control	
	Number	%	Number	%
< 30	23	37	19	41
31-45	22	35	16	35
46 +	18	29	11	24
Total number	63	100	46	100

Table 1b. **Distribution of age categories for elderly care workers**

	Experiment		Control	
Age categories	**Number**	**%**	**Number**	**%**
< 30	9	8	11	11
31-45	49	44	56	54
46 +	54	48	36	35
Total number	112	100	103	100

16.3.3. **ILA experiments**

Typical to both experiments was that a broad variety of courses and training was possible. Workers could choose courses varying from work-task related training to courses in personal effectiveness. However, in both experiments a connection to the job was strongly emphasised. In the technical installation companies, for instance, workers and their immediate supervisors had to come to a formal agreement on how to spend the budget available. The technical installation sector used standardised personal development plans. In the framework of the ILA experiments, employers, especially in the SMEs, were coached by external 'employability advisors' to set up personal development plan meetings with workers.

The guidance structure was not greatly emphasised in the elderly care experiment. Workers had an initial contracting meeting with the personnel and training advisor, in which they talked about the possibilities of ILAs and the learning needs of the worker. The immediate supervisor could give advice to the personnel and training advisor and the worker about how to spend the budget but this advice was not binding. Further guidance after the initial meeting was optional. The ILA instrument was complementary to the existing training facilities in the organisations.

16.3.4. **Data collection and analysis**

The experiment group in the technical installation sector comprised 63 workers and the control group 46 workers. In the elderly care sector the experiment group comprised 112 workers and the control group 103 workers.

In the first and second measurements we collected data through questionnaires mostly containing (five point) ordinal Likert scales and semantic differential scales. In the second measurement we also conducted in-depth interviews with 14 respondents in the experiment groups (10 elderly care workers and four technical installation workers). These

interviews consisted of questions based on the theory of planned behaviour, questions about their perception of the dialogical learning culture and of the effects of ILAs. Additionally, we interviewed the four immediate supervisors in the technical installation companies and the four personnel and training advisors in the elderly care companies about the course of the experiments and their observations of the learning intention of the workers and the dialogical learning culture.

Apart from examining the relative importance of the several behavioural determinants through multiple regression analysis, we also used both parametric and non-parametric two-tailed tests to assess the significance of the differences in behavioural determinants between the experiment and control groups. The study in the technical installation sector was considerably smaller and included fewer older workers than the required number of 30. Therefore, for the specific analysis in this group we employed non-parametric tests of significance. The results are reported at a 95 % level of significance or higher [36]. For the analysis of the interviews we employed a qualitative codification method.

16.4. Results

In this section we compare the outcomes from the two different sectors, focusing mainly on the respondents over 45 years of age. First, we present the effect analysis of the ILA experiment on learning intention and its underlying behavioural determinants and then we discuss the effects of ILAs on the dialogical learning culture.

16.4.1. Learning intention

An initial analysis in the technical installation companies shows that, in the last five years, older workers participated significantly less in formal education than the younger age groups. The participation percentage decreases in the older age groups. In contrast, in the elderly care organisations, activities are equally divided over and within the age groups. In the first round of measurements we see that learning intention and age of workers in the technical installation companies are mutually dependent. Figure 3a shows that the experimental group has a steeper slope, which

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[36] Further details about the statistics are available from the authors.

means that age and mean intention scores correlate particularly highly in the experimental group. In the first round of measurements there was a small significant difference regarding intention between the experiment and control groups.

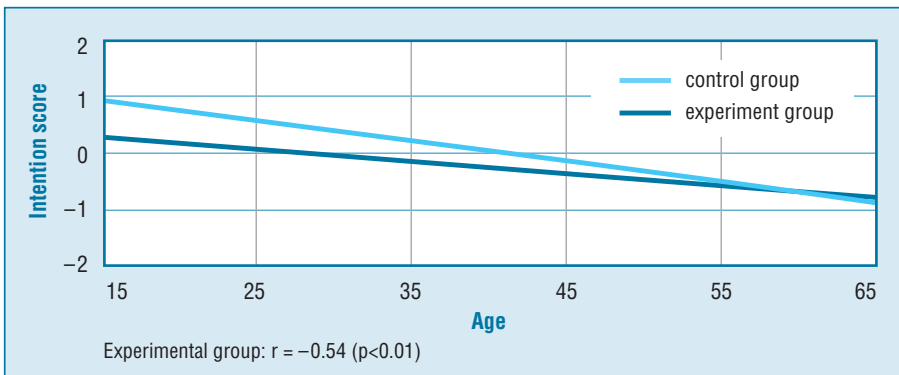Figure 3a. **Relationship between age and intention score in SMEs (first measurement)**

Figure 3b. **Relationship between age and intention score in SMEs (second measurement)**
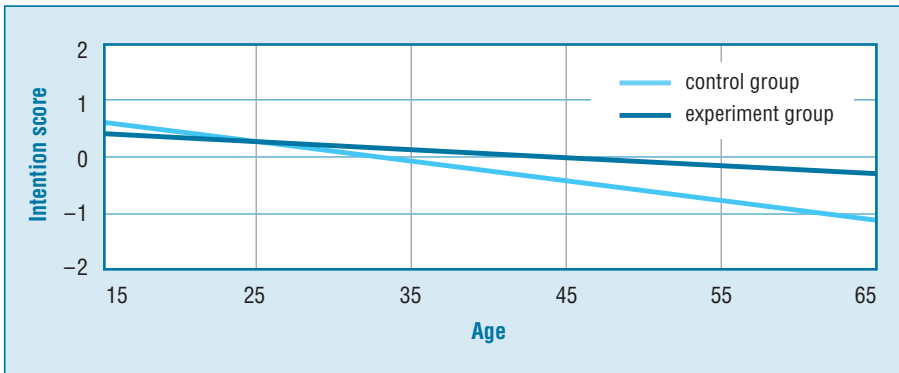

Figure 3b shows that the slope representing intention scores, set against age, is much less steep at the end of the experiment. We see that younger workers are less inclined to engage in training activities and that the intention scores of older workers increased during the experiment. Although the increment of intention is not significant, at the end of the experiment the mean intention scores of older workers with a learning account was higher than

among older workers without ILAs. This analysis shows that ILAs have both a positive effect on the learning intention of older workers and an equalising effect on differences of learning intention between the age groups. Analysis in the elderly care sector, however, shows that in the first and second measurement, learning intention of workers does not correlate with age.

Closer analysis of the Ajzen model among the older age-groups shows that attitude is the most important determinant of training intention for older workers in both sectors. The rate to which older workers value learning and training as 'fun' or 'interesting' (affective attitude), determines to a large extent the intention of the technical installation workers to engage in training activities. At the end of the experiment, the affective attitude of older workers in the technical installation companies seemed to be strongly determined by positive experiences with the guidance and coaching offered by the employer and the positive evaluations of training followed with the voucher. In the elderly care organisations, however, affective attitude correlates positively with the rate to which respondents experienced more freedom of choice as a result of the individual learning accounts, and not with positive experiences with training followed with the learning accounts. In contrast to the workers in technical installation enterprises, these workers experienced more freedom of choice in the framework of the learning accounts experiment. A respondent said:

'Through ILAs I got much more possibilities to do something that I really wanted. Normally I never take the initiative to follow a course'.

Workers in the elderly care organisations generally have a more positive attitude towards schooling in all age categories than technical installation workers. The initial attitude of older technical installation workers towards engaging in learning activities can be illustrated by comments such as, 'I don't see myself back in the school bench' or 'I only learn from practice'.

Interviews with respondents in the elderly care organisations illustrate that attitude and intention to engage in learning activities are highly dependent on biographical experiences. Respondents commented that they started their vocational training later on in life. Some respondents entered the labour market when their children became more independent. All respondents commented that they felt more engaged in learning at an older age, because they chose this specific vocation. One of the respondents commented:

'If you get the chance to follow a course at an older age, then you really work for it. You know what it is worth and that you have to do something for it'.

Table 2a. **Schooling objectives for technical installation workers
(more than one answer), %**

	Employees' age (yrs)	
Objective	under 46	46 +
I want to perform my job better	51	33
I want more responsibility	15	21
I want a higher position in the company	19	4
I want another job outside the company	3	4
I want to follow a course that I like, for my personal development	44	29

Table 2b. **Schooling objectives for elderly care workers (more than
one answer), %**

	Employees' age (yrs)	
Objective	under 46	46 +
I want to perform my job better	58	59
I want more responsibility	18	13
I want a higher position in the company	189	4
I want an other job outside the company	14	9
I want to follow a course that I like, for my personal development	62	54

Compared to younger workers, more older technical installation workers wished to obtain a more responsible position through training (Table 2a). Most of the courses followed in these companies were for personal development related to the job, such as driving lessons, trailer driving lessons and computer courses. Some workers chose technical courses such as measurement and control engineering, roof-covering training, installation and assembly of central heating boilers and courses in sanitary design. Relatively more older than younger workers in these companies chose management courses.

Elderly care organisation older workers chose training activities because they wanted to increase their proficiency and develop themselves (Table 2b). They wanted to broaden or deepen their current activities rather than to carry more responsibility. Broadening of activities means, for instance, that workers operating at lower function levels want to carry out tasks that officially do not belong to their positions, for example an assistant nurse who

wants to distribute medicine. The deepening of activities means that workers want to know more about certain elements of their jobs (for example, nurses who want to explore the possibilities for palliative care in their organisation). Elderly care older workers, in particular, chose computer courses for personal development. A worker reported:

'I don't work with computers in my job, but I would like to keep up to date with recent technologies'.

16.4.2. Learning culture

Technical installation workers' perception of a dialogical learning culture decreased significantly between the two measurements, in all age groups. Interviews with workers and employers confirm that the voucher experiment influenced the way in which training, performance and development was initially a subject of conversation on the work floor. One worker said:

'Right after the meeting with the employer everybody talked about it and I thought: it would be nice to know a little bit more about this and that'.

However, during the experiment, attention to learning weakened in spite of regular attempts by the employers to encourage it. Workers gradually lost interest in the subject, particularly after the personal development plan meetings,. An employer said:

'Later on in the experiment it became increasingly harder to keep the subject of learning and training alive on the work floor'.

Employers explained that workers need a lot of coaching to make training choices and find a suitable course. We do not find any relationship between the implementation of personal development plan meetings (and the evaluations of these meetings by the workers) and a dialogical learning culture. No matter how positively workers experienced the individual personal development plan meetings with the employer, it did not affect the informal learning culture on the work floor.

In the elderly care organisations, however, we find notable effects of ILAs on the colleague interaction subscale of dialogical learning culture. The interaction with colleagues about performance, training and development increased significantly. One of the workers commented:

'Through ILAs we talk much more about following courses. Even now we regularly call another colleague to account about what she learned in an assertiveness training: the way she deals with things, the way she gives feedback […]. The course really did something to her!'

Account holders in the elderly care organisations reported that they would prefer to make their own training course choices (or discuss this with colleagues) rather than apply to the formal organisational infrastructure for guidance and advice. A nurse reported: 'I really had a hard time deciding what course to follow and when. You could ask for guidance, that's true, but I'm not the kind of person who does that very easily. However after I exchanged some ideas with colleagues, we made a decision'.

16.5. Conclusions and discussion

Several aspects of these results require further reflection about implementing similar instruments for lifelong learning in work organisations. When reflecting on the differences and similarities between these two studies conducted in such distinct sectors, two aspects require further attention: the initial learning intention of older workers and the effect of ILAs; and the different outcomes regarding learning culture.

These studies pointed out a considerable difference in the initial learning intention of older workers between the technical installation sector and the elderly care sector. Attitudes towards education in the elderly care sector seem to relate to specific life course experiences. These biographical narratives are quite different from those of the workers in the technical installation sector that mainly comprised male workers who entered labour market at a young age (18 or 19 years of age) and remained, if not in the same company, in the same sector. An important difference is that older workers in the technical installation companies took part in post initial training activities to a far lower degree than their younger colleagues. ILAs, however, seem to have an effect on learning intention, especially for older workers in this sector.

Elderly care workers had much more experience with on-the-job and off-the-job training than technical installation workers. The employee-driven approach was a new experience for elderly care workers and it positively influenced their attitude towards learning (hypothesis 1). Through ILAs, older workers in the technical installation companies in particular had the opportunity to gain positive learning experiences, which had a positive influence on their affective attitude towards training and learning (hypothesis 2).

Therefore, we could conclude that learning attitude and learning intention might relate to differences between a short term imperative and a long-term perspective on corporate development and to different life course

experiences of men and women. Future implementation of worker-driven instruments such as ILAs should consider the question of whether the assumed reduction in motivation of older workers would be an issue typical of male workers rather than female workers. Further, different effects on organisations with different prevailing training and development policies should be taken into account.

Another interesting difference between the two work environments concerns dialogical learning culture. Elderly care workers drew mainly upon support provided by colleagues to make individual training decisions, with ILAs having a significant effect on the informal learning culture among colleagues. They preferred support sources near at hand, choosing the support of colleagues over the guidance of training advisors. We did not find such an effect in the male dominated technical installation companies. The differences between the two work environments could be attributed to different styles of interaction among men and women and to the frequency of interaction among colleagues. In the elderly care organisations, nurses of different function levels work together much more than workers in the technical installation companies who operate more autonomously and find themselves more on the road visiting clients.

Therefore, ILAs did not result in more openness in communication among workers about learning and development on the work(shop) floor in the SMEs and did not seem to produce an effect on dialogical learning culture. Further, positive evaluations of the personal development plan meetings did not result in a more positive learning culture on the work(shop) floor in either of the two sectors (hypothesis 3). This means that the implementation of personal development plans does not necessarily affect the informal learning culture in the labour organisation. This learning culture, however, did not seem directly to enhance technical installation workers' self-confidence and the intention to take up learning activities (hypothesis 4). External supervision and guidance seem to be important in stimulating this informal learning culture in technical installation companies. An employability-advisor who is well acquainted with the sector, and the issues of SMEs in particular, could serve as an external source of reflection to employers. With respect to future policy-making, the key role of sector training funds should be taken into consideration.

Finally, we would say that ILAs did have a modest effect on the learning intention of older male workers in the technical installation companies. Effects of ILAs on learning intention and learning culture depended on context specific characteristics such as corporate training policy, frequency

of interaction between colleagues and gender aspects. This study reveals that the workings of these characteristics must be taken into account when implementing instruments for employee-driven training and career policy. ILAs can stimulate employees to engage in learning and educational activities; but cannot be a magic potion.

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CHAPTER 17

Older workers' learning in changing workplace contexts: barriers and opportunities

Alison Fuller and Lorna Unwin

Abstract

This chapter focuses on the relationship between the organisation of work and opportunities for learning for employees over the age of 40. It is based on research in the steel and metals sector in England and Wales. This sector has undergone considerable change in response to increased global competition, diversification of product markets, and advances in technology. Using a combination of interviews, observations and structured 'learning logs', the chapter presents data gathered in two companies. It argues that factors such as occupational status, orientations to work and learning, trajectories of participation, and labour-market position influence how different groups of older workers perceive and respond to workplace change. It also shows the need for further research into the ongoing learning of older workers and the ways in which different groups are affected by organisational and wider social and economic change. More research is also needed on how such changes can be more successfully implemented in organisations whose cultural history indicates that they produce a range of tensions.

17.1. Introduction

This chapter examines the relationship between the way in which older workers react to learning opportunities and the way in which their work activities are organised. It argues that factors such as occupational status, orientations to work and learning, trajectories of participation, and labour-market position influence how (different groups of) older workers perceive and respond to workplace change.

Many countries across the developed world are beginning to examine the implications of an ageing population. Some governments, such as in the UK, where there was a 51 % increase in the numbers of people aged 65 and over (9.4 million) between 1961 and 2001 (Summerfield and Babb, 2003), are telling adults they will have to stay in work until at least the traditional retirement age of 65 to sustain their pensions, and also because the economy needs them. The extension of working life has many social, economic and political implications, and poses challenges in terms of workforce and personal development. At the same time, workplaces are witnessing new forms of work organisation, the widespread use of information and communication technologies and attempts by many organisations to reformulate and extend the role of individual workers.

The chapter is divided into three sections. The first examines the changing nature of work, and the different approaches to the organisation of work and learning. We argue that, while learning as participation has become the dominant metaphor through which theorists are seeking to understand learning at work, it does not adequately capture the reality of many workplaces. In the second section, we draw on data from our recent study of older, experienced workers in the UK steel and metals sector to shed light on the relationship between (different) forms of work organisation and the (different) opportunities for learning which employees experience [37]. In the next section, we argue that our findings suggest factors such as attitudes to learning, organisational culture and history, the way jobs are designed and rewarded, and the way work is organised, help explain the lived realities of workplace learning for older workers.

This chapter adopts an inclusive interpretation of what counts as workplace learning. By this we mean that opportunities for participation (learning) include those that might be viewed as more formalised and intentional as well as those characterised as incidental (*inter alia*, Marsick and Watkins, 1990; Billett, 2001; Eraut et al., 2000; Beckett and Hager, 2002).

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[37] This project formed part of a research network entitled, Improving incentives for learning in the workplace, funded under the Economic and Social Research Council's Teaching and Learning Research Programme (award number L139 21 1005).

17.2. Workplaces in a changing economy

Debates about the changing nature of work are central to any discussion of workplace learning as they highlight the variability of workplace contexts (*inter alia*, Engeström, 2001; Rainbird et al., 2004). In addition, the relationship between new forms of work organisation and the creation of workplace knowledge has started to emerge (Boreham et al., 2002). For some time now, the key overarching questions have been whether a period classified as Fordism or industrial society has really given way to a new era of post-Fordism/industrialisation or flexible specialisation (Wood, 1989), or has produced the knowledge economy (*inter alia,* Keep, 2000; Lloyd and Payne, 2002). Variations on this theme include Gee et al.'s (1996) new capitalism, Castells' (1996) concept of the information society, and Rouach and Saperstein's (2002) innovation economy. The second area of debate concerns the implications of changing forms of organisation and styles of production (including the role of new technologies) for skill levels (*inter alia*, Zuboff, 1988; Casey, 1995; Brown et al., 2001) and for knowledge production (Gibbons et al., 1994).

New forms of work organisation are often characterised by the extent to which they involve employees in work-related decisions and other practices (e.g. team working, information disclosure, quality circles) designed to improve organisational performance. Although some studies have reported a link between the implementation of 'bundles' of such high involvement working practices and improved organisational performance (*inter alia*, Appelbaum and Batt, 1994; Guest, 1997; Ashton and Sung, 2002), there is little empirical evidence about the relationship with workplace learning. Further, these so-called employee involvement practices are being critiqued from the perspective of the sociology of work and the labour process more broadly (Forrester, 2002; Brown, 1999).

There is a direct link between the focus on employee involvement and the metaphor of learning as participation (Fuller et al., 2003) as both recognise the social nature of workplace activity. However, just as the concept of involvement is being critiqued, we would also point to problems with exclusively adopting theories of participation and situated learning when studying learning at work. In particular, the work of Lave and Wenger (1991) is problematic when considering older, experienced workers as their theories developed from analysis of how new entrants learn to become members of a community of practice through the process of legitimate peripheral participation. They focus on the journey of newcomers (novices) from the

periphery of the community to the mainstream and have much less to say about the ongoing learning of experienced workers (Fuller et al., 2005). In addition, the situated approach has little to say on the ways in which organisational factors directly impact on and shape workplace learning opportunities (*inter alia*, Probert, 1999; Koike, 1997; 2002).

While situated learning theory has played a vital role in securing recognition for the workplace as a site of genuine learning, this can be a catch-22 situation. We know from survey evidence in the UK, that many employers do not invest in off-the-job training for workers below managerial level (La Valle and Blake, 2001; Felstead et al., 2005), so an over-emphasis on learning as highly context-dependent may simply serve to further reduce workers' opportunities to experience different learning environments and to benefit from studying topics which are not immediately job-related.

Finally, we note the importance of individual dispositions in relation to workplace learning (Billett, 2004; Hodkinson and Hodkinson, 2003). In our view, however, it is necessary to recognise the importance of structure in shaping the character and availability of workplace learning opportunities, while at the same time viewing individuals as active agents who can elect the extent to which they engage in the situations open to them.

17.3. Workforce development: evidence from two companies

In this section, we focus on groups of older, experienced employees aged between 40 and 65 in two companies from our research project: a manufacturer of steel-based products with 700 employees (A); and a steel processing mill with around 200 employees (B). In both companies, labour turnover has been low historically and the majority of employees have several years' service. In company A, at least 50 % of the workforce falls into the 40-65 year old band, while in company B, the proportion of older workers is around 90 %. We used a multi-layered case study approach and gathered data through interviews, structured learning logs, surveys and observations. The interviews explored a range of themes including: worker biography (e.g. educational experience, occupational history); attitudes to work; worker identity; current participation in learning (on- and off-the-job); the relationship between learning and everyday work activity; and future plans and aspirations. The structured learning log was developed as a tool

to help individuals capture the different ways in which they engaged in learning as part of everyday workplace activity as well as any off-the-job learning experiences. We felt that by deliberately recording this information, workers might remember more than they would in an interview. The log asked for responses under a series of headings including: types of learning experience; improvement in capabilities (e.g. problem solving, self-confidence, critical thinking); how new learning was achieved (e.g. by working alongside an experienced colleague, by direct instruction from a trainer); attainment towards a formal qualification; access to expertise and support; variety of job task undertaken; and helping others to learn. The log data proved to be an important supplement to the interview data and we are now developing this instrument for use in other projects.

The case studies revealed strong contrasts between approaches to workforce development in the two companies and highlighted links between these and the different ways in which employees experienced workplace learning. Company A, which is American owned and profitable, designs and manufactures bathroom showers, thermostats and valves. A key indicator of the company's commitment to workforce development is its well-developed internal labour market in which staff, including former apprentices, can gain promotion to senior management. The company's approach to apprenticeship formed the model for our analysis of the features which, we argue, constitute an expansive learning environment (Fuller and Unwin, 2003). In keeping with its emphasis on workforce development as a central dimension of its quality and competitiveness strategies, the company introduced a pilot progression programme for production operators based on attainment of a National vocational qualification level 2 (NVQ 2) in engineering production [38]. As a contribution to the company's evaluation of the pilot, we asked 11 experienced operators to complete (weekly) learning logs over a period of eight weeks (Fuller and Unwin, 2004 for methodological details). Of the 11, five were involved in the pilot and six were not. This enabled us to examine whether involvement in the programme led to learning opportunities and experiences beyond those encountered in daily work situations. The data showed that there was little difference between the everyday learning experiences of the two groups, although those participating in the programme were slightly more likely to state that they had learned something new. Both groups reported learning on-the-job and from

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[38] National vocational qualifications (NVQs) are competence-based and awarded at five levels, with level 1 being the lowest. Level 2 is associated with semi-skilled work.

colleagues as the most popular methods of learning at work. They indicated that they felt supported and could ask for help when needed, and that they were often involved in helping others to learn. Overall, the positive attitudes towards workplace learning were consistent with a workplace environment characterised by the sorts of high involvement working practices identified earlier in the paper.

Company B manufactures steel rods and bars for the construction industry and, as a result of the sector's struggle to match cheaper imports from overseas, the company's workforce has been contracting. The vast majority of employees have been with the company for many years and nearly half have over 20 years service. The workforce is divided broadly into two groups: production workers and maintenance engineers. Historically, the company has had a good reputation for training and apprenticeship, but now the apprenticeship programme has been suspended and the in-house training centre disbanded. As a consequence, the personnel manager set up a scheme to fund non-work related education and training, off-the-job, for those employees who wanted to continue learning but whose jobs could not be expanded.

An important indication of the difficult business climate in which the company was operating at the time of the research, was its decision to introduce flexible working practices, a move negotiated with the trade unions. This involved moving away from a structure based on specific occupational skills and seniority, to a broader team-based approach, and the creation of team-leaders. The new approach required all members of the team to be competent in at least 60 % of the team's tasks. Although many of the production operatives were given the opportunity to gain pay and status through engaging in the learning necessary to achieve 60 % competence, some of the craftsmen (maintenance engineers) and senior operatives were already paid more than the new threshold. There was, therefore, little incentive for these workers to broaden their existing range of skills. Further, the changes relating to the company's approach to work organisation, employee status and pay were sensitive and undermined the established division of labour and status between engineers and production workers.

As part of the study of company B, we conducted in-depth interviews with four experienced employees who were participating in non-work related learning outside work and with a further 12 employees, all of whom had substantial experience with the company and had been selected for the new role of team leader.

17.4. Discussion on research findings

We now examine our findings in relation to two themes: worker attitudes to learning and its relevance to their jobs; and the relationship between learning at work and organisational change.

17.4.1. Attitudes to learning

The older, experienced employees in our study appeared to be positive about learning when it was seen to be relevant and helped them to do their jobs better or more easily. Data from a survey conducted in company B revealed that two thirds of respondents had participated in job-related learning at the company in the year prior to the research. Three quarters of respondents indicated that they would like to participate in such learning opportunities in the succeeding 12 months.

In another section of the survey, respondents were invited to respond to a range of statements on training which were designed to elicit their attitudes to participation in activities with a deliberative learning intention, as opposed to the more reactive process associated with learning as a by-product of doing the job (Eraut et al., 2000). The findings reinforced the view that the majority of respondents feel positively about training both for its relevance and for the activity itself. For example, 70 % disagreed with the statement 'training wouldn't help me to do my job better', and three quarters agreed with the statement 'training is enjoyable'.

A quarter of respondents indicated that they would like to participate in formal learning activities (e.g. college courses or distance learning) outside the company. While this proportion is significantly smaller than the proportion of respondents who indicated that they would like to participate in job-related learning at the company, it indicates that there is an appetite among some older workers for learning beyond the parameters of what they need to know to be able to perform their (current) jobs effectively at work.

Those employees who had career or personal aspirations beyond their current jobs were more likely to view opportunities to learn outside work positively than those who were content with their position and who were not aspiring to change. This attitude was the case for employees at company B who were participating in non-work related learning activities. It was also the case for employees in company A who were following work-related courses which had been chosen to support their career development aspirations, as well as the company's strategy of supporting learning assessed as relevant to achieving business goals. For example, over the past five years and with

the company's support, Tom ([39]) has participated in a range of work-related courses. He outlined his experience and expectations as follows:

'I came here [joined the company] and I thought I could do with some electronics knowledge so I saw my manager who said do a college course, so I did an HNC [Higher National Certificate] in electronic engineering. I finished that and asked if I could do the HND [Higher National Diploma] because it helps with my job, it makes me more efficient in my job, so therefore it saves the company money in the long run […] Hopefully you're not doing the college course just because somebody's telling you to do it, you've got to want to do it, that's important. If you're doing it you've usually identified a reason for it. In my case it's […] to make my job easier – that was my personal benefit, and the company benefits because it gives me more time to do other things, and at the end of the day you're hoping, I suppose at the back of your mind you want to move you up the ladder. The more confident or capable you are in your job and the rewards should be there'.

Simon, on the other hand, who has worked for company B for 24 years as a production operator, is participating in a different kind of off-the-job learning from Tom. Over the past five years the company has supported him as he has followed humanities courses with the Open University. At the time of the interview he was close to completing his BA honours degree. He said:

'Basically once I'd been in the steelworks I started reading first off papers, obviously, and graduated from *The Sun* and *Star* and ended up with *The Telegraph* and *The Independent* […] as I was reading I just wanted more out of the reading, and more understanding as you do. I was reading novels and then I switched to historical fiction and then war biographies and then I found myself, I just wanted to formalise what I was doing myself, self-learning. I wanted to make sure I was getting full potential out of the books I was reading. I thought the best way to do that was to go with the OU [Open University] eventually […] No one's pushing me in here to get more education. It's all voluntary […] I'm 100 % sponsored by work'.

When asked how he perceived the value of the knowledge and qualifications he was accumulating, Simon cited their importance in terms of personal development and growth and as an endorsement of personal effort. He also noted the difficulties facing the steel industry and the increasing value of qualifications to individuals in the labour market:

([39]) All names have been changed to protect respondents' anonymity.

'As I say because the steel's declining as an industry, I feel that I'll need a qualification to move into a different industry. I don't think I'd go into production work now'.

Other workers who were also voluntarily participating in study outside work confirmed Simon's comments. The employees selected to become team leaders, and to follow the team leader training, believed that participation in the programme and achievement of the accompanying NVQ 3 was improving their self-confidence and would strengthen their labour-market position in the event of redundancy.

17.4.2. Relationship between learning at work and organisational change

Overall, there was a distinction between the way in which employees in the two companies perceived the relationship between learning and organisational change. In company A, change was perceived as a continuing and integral aspect of working life, central to the company's continuing success. The notion of organisational change aligned within a coherent and consistent high involvement organisational culture, valued the contribution of individual workers and teams, alongside its emphasis on continuous performance improvements, the design and development of high quality products and high levels of cooperation between managers and workers.

The company's training officer said:

'I think, yes, whatever else training does, it has to enhance capability. If someone is more capable and more employable, the business benefits anyway because they can do more and they are better at it. In the examples we give, or the example I gave in the two briefings recently to the other assessors, I was making the point that I think people need to be stretched and gain more underpinning knowledge. It is all very well saying to someone, "why have you fitted that seal with such care?" It is not good enough for them to tell you, "Oh, otherwise it might leak". We want them to talk about pressure and decay over a period of time of pressure-sealing if they don't quite fit that properly […] I want them to know that if they are not expanding, if they are not developing that way – now many of them would already have this […] but I do know a lot of people would not […] Similarly in terms of the business, I think that at the end of it they should have a better idea of how this business clicks together, like a jigsaw […] So that's what I want them to get out of it, you know […] I have been encouraged all the way by ([…] human resources manager) and my director and by the people I come into contact'.

In contrast, in company B, the need for organisational change was associated with a direct and immediate threat to the survival of the company. Employees regarded the change as a direct challenge to the historical division of labour, established status arrangements, and pay differentials. The target of achieving competence in 60 % of tasks was perceived to be encouraging a superficial approach to on-the-job training. Some respondents did see the opportunities for new learning that had been created by the introduction of the new agreement, but the overall reaction was negative.

The reasons for this negativity can be traced to the use of employees with a background in craft skills, and with engineering qualifications, to perform the company's engineering maintenance functions. They are products of specialist training programmes, which typically begin with an in-depth apprenticeship, with further upgrading over time by participation in off-the-job courses. These employees are sceptical of the move to team working which assumes that tasks can be learned relatively quickly.

Alternatively, production employees who have enjoyed less status and pay, and who have not had so much opportunity to participate in off-the-job courses, have tended to perceive the organisational and consequent effects on training in a more positive light. Interviews with the new leaders of production teams revealed that the new arrangements had a significant impact on their job role. They indicated that helping team members to acquire the new skills and knowledge necessary to achieve their 60 % competence threshold was a major part of their responsibility and took the majority of their time:

> 'Most of my 12-hour shift is spent training other people.'

In contrast, the engineering team leaders stressed that members of their teams were already highly experienced, and were skilled and qualified engineers. They did not require further training in their specialist areas and already had the equivalent, or higher, pay levels and status than those recently achieving the 60 % threshold. According to one engineering team leader, his and his team's primary function revolved around the performance of their technical function:

> 'In a normal shift, 50 % [of time] is spent on breakdown and recovery and 50 % on scheduled inspections and maintenance'.

There are two points at issue here. First, we highlight the sense that the historically superior pay differential enjoyed by the engineers was being undermined by the ability of production workers to improve their pay through achieving 60 % competence. Second, the long-established higher level

status previously associated with the engineers' specialist skills and formal qualifications was being undermined by an approach which elevated the value of multiskilling and flexibility. The following quotes from a long-serving production operator highlight the tensions that have emerged from moving from a system based on seniority to a system based on task competences.

> 'Right up till recently I suppose that training in-house was expected within the system we had, and the system we had was move-ups on sickness, illness and absenteeism, so we would move up and we would learn the next job that was in front of you […]'

He went on:

> '[…] the thing was, instead of being a specialist in a particular area […] it was agreed that we became, come away from the specialist attitude because the problem is if you have got a specialist, this is the way the management looked at it, if that specialist is not here then you might have someone moving up that is not so competent in that job, so they were looking for a broader scope'.

The introduction of the new form of working, while ostensibly increasing learning opportunities as individuals were encouraged to pass the 60 % competence threshold, was experienced and perceived differently according to the prior status and individual disposition of workers.

17.5. Conclusions

Our research methods and findings have enabled us to draw out important similarities and contrasts between the two companies in the relationship between (changing) forms of work organisation and opportunities for workplace learning. Two lessons emerge: first, managers who are attempting to introduce new forms of work organisation need to assess the knock-on effects in relation to how people are managed, supported and developed; and, second, they need to assess the implications of change for different work groups. The changing organisational context and learning culture revealed in company B was reflected in respondents' mixed attitudes to learning in relation to the new requirements associated with the introduction of flexible team working. In contrast, we saw in company A how the strong and embedded learning culture was shaped by, and in turn shaped, respondents' attitudes to workplace learning.

In company A, high involvement working practices flow from, and are consistent with, the shared values of the organisational learning culture. In

company B, the attempt to introduce higher employee involvement through the new team system was against a background of economic struggle and workforce contraction. It also ran counter to the historical privileging of specialisms and seniority. While some employees resisted the new form of work organisation, others saw it as a chance to increase their learning and progression opportunities. In addition, the quality of the learning generated by new forms of work organisation was perceived by some to have generated superficial, rather than the deeper, learning necessary to achieve genuine flexibility and interchange between team members (also Brown, 1999; Pillay et al., 2003).

We have also related the types of participation in which our respondents have been involved to the associated organisational context and culture and, where appropriate, to new forms of work organisation. This has revealed that there is a need for further research into the ongoing learning of older workers and the ways in which different groups are affected by organisational and wider social and economic change. More research is also needed on how such changes can be more successfully implemented in organisations whose cultural history indicates that they will produce a range of tensions.

17.6. References

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