

# **Sustaining Older Workers' Competence. Case Study Germany**

Simone Kirpal, University of Bremen, Germany  
[kirpal@uni-bremen.de](mailto:kirpal@uni-bremen.de)

Alexander Kühl, SÖSTRA GmbH, Germany<sup>1</sup>  
[kuehl@soestra.de](mailto:kuehl@soestra.de)

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## Older workers and demographic shifts

In Europe, the situation of older workers and how to provide workplaces that adequately account for the particular needs emerging from an aging workforce have gained considerable attention during the past two decades (ILMARINEN 2005). It is anticipated that in most industrialised countries demographic shifts will result in an accelerated aging workforce (the population aged 60 years and older) and a significant reduction in the numbers of people of prime working age within the next few years (BOSCH & SCHIEF 2005). For Germany, in the medium and long term the population aged over 65 years will increase significantly: it is expected that it will be by 60 per cent higher in 2035 than it was in 2002. While the population aged 55 to 65 years old has been declining since 1996, it will raise by 30 per cent between 2007 and 2025 with the expectation to stabilise thereafter at the level it reached in 2002.

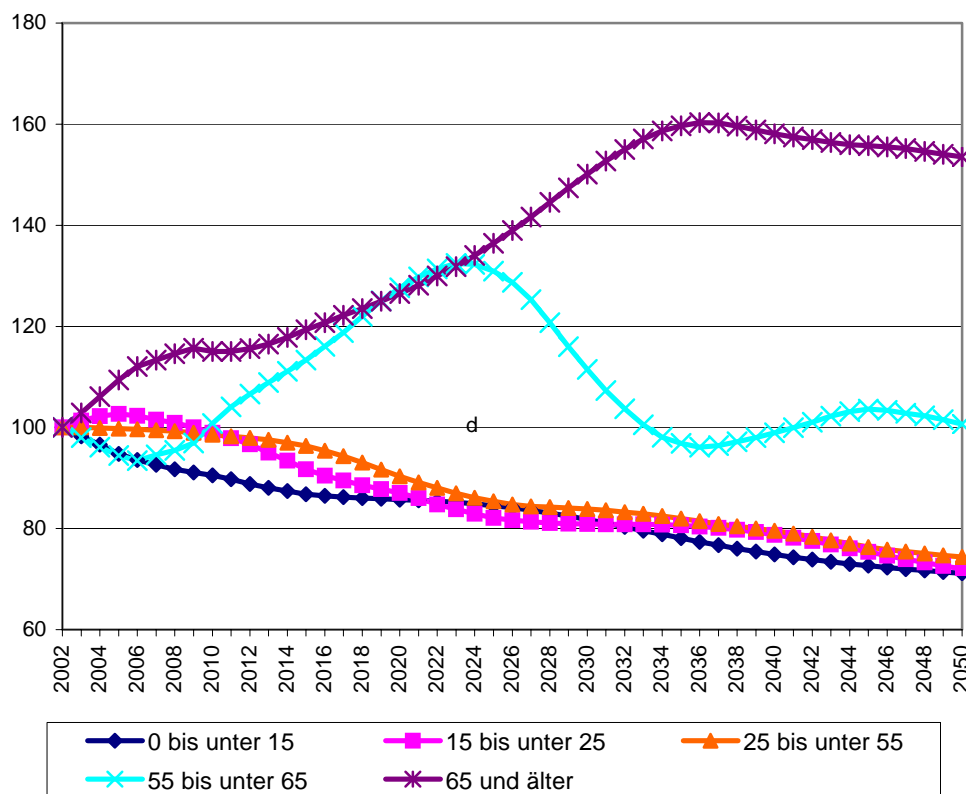


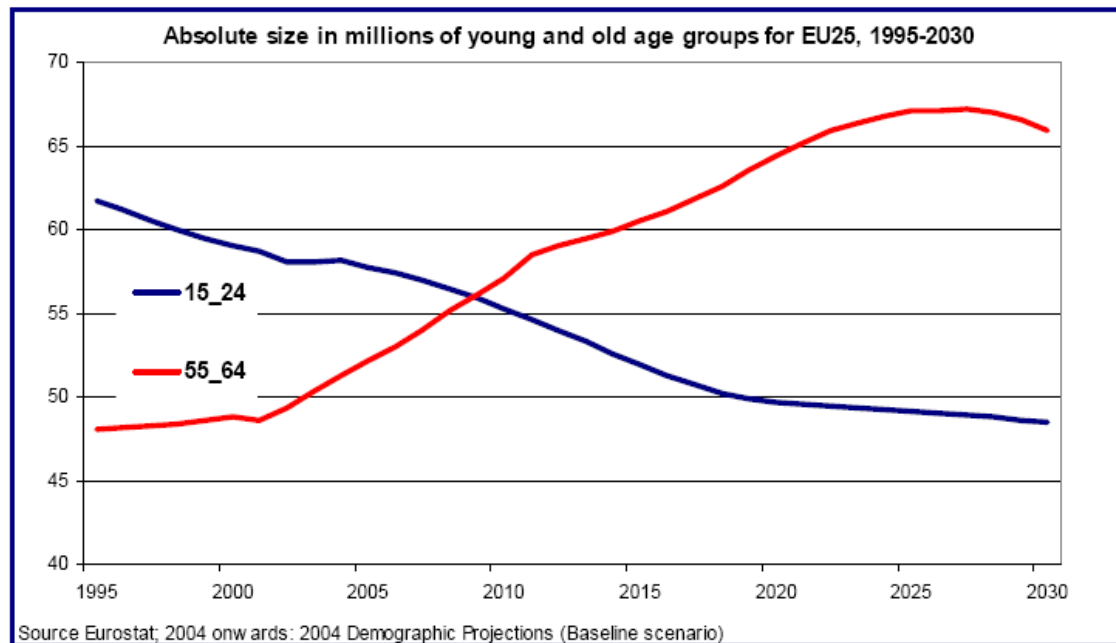
Figure 1: Forecasted demographic development of different age groups for Germany

Against these general trends regional differences within Germany significantly affect future labour market developments and training requirements. A comparison between the old West German states with the newly formed German states, for example, reveals that the impact of an aging population will be less significant in the former Eastern part than in the old West German states, but will rise earlier in the eastern parts of Germany (cf. CONRADS ET AL. 2005; KISTLER & EBERT 2005 for further details). Further exist strong differentiations between rural and metropolitan areas in that in some areas the relative increase of the aging population will be minimal and partly be compensated by the influx

of younger people (such as is the case for the Munich region), while other areas in rural Bavaria will experience an increase of the 55 to 64 years olds by 60 per cent or more. It is expected that the regional labour markets that face a dramatic increase of elderly workers will face severe difficulties of adjustments (cf. DANN ET AL. 2004).

For Europe as a whole, similar demographic developments, which significantly affect the working age population, are foreseen.

**GRAPH 5: SIZE OF THE YOUNGEST (15-24) AND OLDEST (55-64) WORKING AGE GROUPS**



Graph 5 shows that around 2009 the size of the youngest cohort of the working age population will dive below the size of the oldest cohort. In 2030 there are expected to be 66 million persons of 55-64 and only 48 million of 15-24. This means that the working age population will start declining soon after 2010 and that the labour market will increasingly have to rely on older workers. The graph illustrates that it has become very urgent to improve the employability of our older workers in order to prepare our labour markets for the onset of ageing.

How to respond to these demographic developments in terms of providing suitable workplace and learning environments as well as adequately skilling an aging workforce have become major concerns for policy as well as companies. With the concurrent Europe-wide decline of employees aged below 55 years, one agreed goal at the European level is to keep an increasing number of older workers in gainful employment as long as possible (EUROPÄISCHE KOMMISSION 2003:157ff). To reach this goal the European Council recently has made two wide reaching – and as it turns out too ambitious – resolutions by which in 2010 the employment rate of the 55 to 64 years-old should reach 50 per cent. Concurrently should the retirement age be raised by 5 years on average in all European member states. For Germany, this means a rise of the 2003 employment rate of

40.2 per cent of the 55 to 64 years old by 25 per cent within the next five years, and to increase the current retirement age of 65 to 70 years. Against this European perspective, recent policy debates in Germany resulted in a preliminary agreement that the retirement age should be raised from currently 65 to 67 in 2029, starting with the gradual increase in 2012.

However, despite various forecasts at the European level, which predict a dramatic decline of the working age population and workforce shortages (cf. COOMANS 2005; EUROPEAN COMMISSION 2005:23), we argue that for Germany (as well as for most other European countries) the main challenge for the future is not to having to deal with a general decline of the working age population, but rather to respond adequately to the particular needs of older workers. Not surprisingly, apart from quantitative concerns the quality of skills and the requirements and provisions that are needed to ensure adequate skilling processes have also turned into major issues of concern. Whilst German employment rates of older workers roughly reflecting the EU average (BUNDESAGENTUR FÜR ARBEIT 2005), it is expected that Germany will encounter a severe mismatch of skills in the near future, which for some areas and sectors will be significant. This is particularly the case where knowledge intensive workplaces increasingly rely upon employees with advanced and more complex skill mixes. The already emerging mismatch can be regarded as a result of Germany's declining investments in human capital formation during the past twenty years in education and training in particular (KUWAN & THEBIS 2004). At the European level, those qualitative aspects of sustaining older workers' competences are being linked with implementing and improving strategies of adult learning and continuing vocational training in the framework of lifelong learning policies (cf. for example OECD 2004a).

### **European initiatives: Green Paper on Demographic Aging**

At the European level, several initiatives were and are being launched to define and implement new policy priorities that account for an aging workforce and labour market implications of demographic shifts. Those initiatives and policy guidelines also set the framework for new policies and actions at the national level. Among others, compensating measures include providing support for the employment of women and older workers as well as for companies and their restructuring initiatives and investments in education and training to meet the specific needs of older workers. With the Green Book on Demographic Aging the European Commission has outlined basic principles and policies to foster forms of 'intergenerational solidarity' (EUROPEAN COMMISSION 2005). Among offering a new place to the elderly in the economy and society and promoting solidarity with the very old, one principle also refers to the concept of developing 'life cycle strategies of family, education and work'.

While at the policy level the decline of 'young' workers and the concurrent steady increase of older workers between 2010 and 2030 are widely discussed, companies by

contrast are largely unaware that they increasingly will rely upon the experiences and skills of their older employees (cf. STUBER 2005). This development, on the one hand, implies new professional roles and responsibilities of the older working generation, but on the other hand will also affect the relatively 'young' employees below 55 years of age. Those will more likely be required to assume strategic roles and functions within the company and higher levels of responsibilities at an earlier stage than so far experienced. Thus, the aging workforce also has a strong impact on younger segments of the workforce, which need to become better integrated into education and employment.

### **Fostering older workers' skills development and continuing learning**

An aging workforce requires that companies adjust the management of their workforce skills portfolio and their recruitment policies. Stressing and supporting older workers' involvement in continuing learning and facilitating knowledge sharing in a way that more up-to date technical know-how can be combined with experience-based knowledge that accrues over time are key concepts here. On the one hand, engaging older workers in continuing training may mean that companies and training institutions design and provide training offers, which are more specifically targeted towards meeting the learning needs of older workers. On the other hand it may mean that older workers increasingly assume responsibilities of passing on their knowledge and skills in a more systematic way, thereby engaging in continuing training as trainers, tutors or mentors.

In Germany, both forms of involving older workers in continuing training activities are largely underdeveloped. Of all German companies only 1 per cent offer some kind of training that is particularly geared towards the needs of older workers (BELLMANN & LEBER 2000). Despite active labour market participation of older workers even beyond their retirement age being surprisingly high, their participation in training activities offered by companies is strikingly low: in 2002 60 per cent of all companies confirmed to employ older workers, but only 7 per cent of those companies had those workers participating in the companies' training activities. Notably, great differences exist between small and large employers. In companies of less than 9 employees about 4 per cent of all companies have older workers participating in their training activities. This figure increases to 39 (old West German states) and 29 per cent respectively (newly formed German states) for companies with more than 1.000 employees (BELLMANN & LEBER 2000).

Investigating companies' training strategies, the results further show that companies are more likely to invest in training for their employees under the following conditions:

- The larger the size of the company is;
- The less part-time workers a company employs;
- The more the company relies on advanced technology such as IT and new manufacturing technologies;
- The more higher qualified employees a company employs;

- The more female workers a company has;
- The more trainees a company has, and the more profitable the company is. This means that large companies, which rely on innovative technologies, are very profitable, have a relatively high number of trainees and a highly skilled workforce are much more likely to invest in training for their employees than small and medium size companies in less advanced segments of the economy, trade and crafts in particular. Thus, employees in small and medium size companies are particularly disadvantaged when it comes to training opportunities to broaden and adjust their skills.

The requirements of companies adjusting their training policies and offers further need to be supplemented by recruitment strategies that can accommodate older workers' interests, potentials and particular assets. Research has shown (KOLLER & GRUBER 2001) that companies' human resources development strategies are in the first place targeted towards employees below the age of 45. Beyond that age, employees are far from being considered for career development strategies. This means that during the last twenty or more years of their career, employees' continuing competence and career development are not systematically and strategically being supported and developed by their employers. Where older employees are interested in engaging in an active participation in continuing training, it is not uncommon that management denies them participation in training courses for further qualification and/or competence development once they have reached a certain age (KIRPAL 2004).

Like is the case with older workers participation in continuing training, most companies carry the prejudice that older workers are not able to cope with major work-related and organisational changes and transformations. As companies assume that their older employees may tend to be overchallenged when facing restructuring processes, they largely ignore the potentials that may derive from making use of older workers' skills, competences and knowledge about the company for the restructuring and transformation of the organisation. Transforming those assets in a positive way may ultimately turn out to be highly beneficial for the company.

In order to reach a sustainable level of integration of older workers in work and training and to ensure their continuing engagement, companies need to become more aware of the assets and skills advantages that older workers possess. Research has shown (EICHHORST 2006b; SPROSS 2006) that older workers commonly are characterised by a high level of loyalty towards their employing organisation. This may be due to the fact that older workers face a much higher risk of unemployment, but can also be attributed to a long period of company attachment. Where older workers have been involved with the company from the initial stages, they typically regard themselves as the carrier of the company's values, prestige and corporate culture. They may, however, apply their seniority position and extensive company-specific knowledge to strengthen their role in the company and to protect themselves against newcomers.

In practice, companies' training and recruitment policies, which are predominantly targeted towards employees below the age of 45 years, convey the notion that the

organisation does not value older workers and their experiences and competences (KOLLER & PLATH 2001). In addition, such a training strategy manifests that older employees face a higher risk of being made redundant and/or being replaced by younger workers. To the extent that older workers perceive that their position is being challenged and their skills are being devalued, conflicts may prevent their active engagement in knowledge sharing, learning and training activities (KIRPAL/BIELE MEFEBUE forthcoming), particularly if this may reveal that they are lacking the necessary vocational skills and competences. Employees, who feel threatened that a younger competitor might take their place, are more likely to be reluctant to share and pass on their knowledge and work experience to others.

Short innovation and product cycles ever more require the continuing adjustment and broadening of vocational skills and competences. Lifelong learning policies and implementation strategies at European and national levels aim at accounting for such a broader approach of competence development throughout life. Self-initiated and self-directed learning thereby constitute key concepts. Notably, we have to be aware that older workers in particular may face severe difficulties in taking advantage of self-directed learning initiatives, because they may not be familiar with such forms of learning, which were not being prioritised a few decades ago when those workers were trained. In fact, the vast majority of older workers, who has not or only to a very limited extent been involved in continuing vocational learning so far, may find it very difficult to take self initiative on their own learning and skills development and actively engage in it. Thus, they require encouragement, support and special guidance through their work environment, management and supervisors in particular (cf. KIRPAL, BROWN & DIF 2006).

### **Older workers and the sharing of knowledge and expertise**

Older workers have substantial portfolios of knowledge and experience gained through work practice. Often, much of this knowledge and experience is lost when older employees leave the workplace, resulting in a significant loss to the company and colleagues. Yet it is very difficult to make older workers' implicit knowledge explicit so that younger and less experienced employees can learn and benefit from it. Moreover, companies often ignore the potentials that can result from sharing these workers' experiences and knowledge. As a consequence, the vast majority of companies does not have mechanisms in place that facilitate their employees' continuity of learning and knowledge transfer across generations of workers. Such procedures would benefit the company and its staff members, as well as recognising the value of older employees' contributions to the work place (WARWICK INSTITUTE et al. 2006).

The European pilot project "Smart Region" can be quoted as an initiative set out to increase the awareness of companies in terms of an aging workforce and to support company-related measures and proactive approaches in this field. Supported by the European Social Fund under the aspect 'management of change' the central pillars of the

Smart Region project are (i) to create awareness and reduce prejudices among all relevant actors and the general public as concerns the changing role and specific needs and potentials of older workers; (ii) to raise the willingness to employ and support older workers; and (iii) to establish regional networks that can facilitate the exchange of successful experiences and methods (such as the WAI – Work-Ability-Index tool [ILMARINEN/TEMPEL 2002]) for implementing age appropriate management in small and medium size enterprises (SME). In order to reach these objectives, measures at company and regional level are developed and carried out in eight selected regions in Germany, Austria and Portugal. Apart from collecting information and identifying good practice examples, the project develops regional scenarios to support the process of developing specific measures and methods. The focus of the measures that the project implements lies on awareness raising by better informing and qualifying multipliers such as policy makers, managers and stakeholders through workshops. The regional networks of enterprises that the project establishes are supported through consulting processes and pilot projects in companies in the project regions. Additional information about the project can be obtained at [www.smartregion.net](http://www.smartregion.net).

The empirical investigation of the Smart Region project in Germany revealed that the inter-generational exchange of work-based knowledge and experience depends on a variety of factors. Below we outline four factors that, with the help of case studies, were identified to be highly relevant (DEUTSCHE RENTENVERSICHERUNG 2007).

1. *The size of a company*: While in larger organisations the knowledge transfer and exchange is more systematic, small companies rather follow an ad-hoc, largely unsystematic approach. This can partly be attributed to the efforts and financial as well as staffing resources that more coordinated systems of knowledge management require. Some companies may also be discouraged to invest in more systematic forms of knowledge exchange, because its benefits are hard to measure as these typically have more medium and long term rather than immediate effects.
2. *The sectoral context and dynamics of (technological) change*: Compared to younger employees, older workers' greatest assets lie in their experience-based skills and work process knowledge, which they have gained over a considerable length of time. This experience-based knowledge, however, may be less important in some work contexts, which, for example, are characterised by short innovation and product cycles or in areas of fast changing technologies. This may result in a fundamental tension between experience-based skills and innovation, particularly in work contexts where rapid (technological) innovation results in the devaluation of knowledge and skills related to formerly applied technologies and work processes. However, while older workers' technical know-how may be subject to wider retraining processes, their familiarity with broader business and work processes remains valuable also under conditions of work-related restructuring and adjustments. More research is still needed to clarify the dynamics between experience-based knowledge and innovation in particular work contexts.

3. *The learning culture of the company*: Systematic ways of knowledge sharing between experienced, older workers and younger workers to a great extent depend on making experience-based skills and knowledge, most of which can be characterised as tacit or implicit knowledge, explicit. Tacit and implicit knowledge is particularly difficult to share. Research on work-related expertise, which investigates in detail how implicit knowledge can systematically be decoded and translated in order to incorporate it into forms of training and knowledge sharing, is confronted with difficult methodological implications. In work practice, documenting and transferring experience-based, implicit knowledge requires special forms of mediation and moderation, which most companies are not aware of or do not know how to apply.
4. *Personal characteristics and attitudes*. Experienced-based knowledge is tied to individuals: To decode and transfer experience-based, tacit and implicit knowledge does not only present methodological difficulties, but also relies upon the openness, willingness to cooperate and communication skills of the individual, who is the carrier of this particular form of knowledge. Apart from negative processes that may derive from ignoring older workers' training needs and potentials thereby devaluing their skills, if, how and under what circumstances knowledge can be shared also depends on the personal characteristics and attitudes of the knowledge carrier.

To improve in-company, inter-generational knowledge sharing some companies have piloted and implemented some rather successful models. Among those models we find:

- *Mixed-aged working teams*

Comprising working teams of employees of different ages and, where possible, generations, almost automatically ensures the representation of a broad range of skill mixes and, with the older workers, the representation of more experience-based and work process knowledge. The advantage of such settings is that they facilitate equitable knowledge sharing without prioritising or devaluing one kind of knowledge over another and without formally ascribing a direction of knowledge transfer. Instead, such a setting underlines an approach of mutual learning and respect.

- *Mentoring*

The process of mentoring enables the knowledge transfer from more experienced to less experienced employees on a one-by-one setting. It is most commonly applied to either guide a new employee, or when an older worker is retiring and his/her job is taken over by a younger colleague and the company wants to ensure a smooth transition and that the relevant knowledge is passed on. The success of a mentoring constellation depends upon a good communication and mutual understanding between the two people involved. It also requires applying more systematic measures of communication and knowledge sharing.

- *Older workforce awareness seminars for managers*

Under the Smart Region project, awareness raising seminars are being conducted in selected parts of Germany as a way to reach companies and make them aware of the implications of an aging workforce. The seminars are targeted at managers to analyse

together with them the age structure of the company/company departments and to project future trends against the expected demographic developments. This is complemented by an analysis of the skills portfolio of the staff according to age groups. The skills, assets and performance indicators as well as the strengths and weaknesses of elderly workers are thereby emphasised. A third step is the evaluation of different measures that account for the needs and potentials of older workers and how to apply and adjust those to the company's needs and expected future developments. Developing company-specific measures and planning their implementation is a learning process, which should result in tailoring and adapting different methods of implementation to the specific needs and conditions of the company.

- *The training of trainers*

Under the Smart Region project training seminars for vocational and in-company trainers are targeted towards making them aware of the skilling and learning needs of older workers. Working with older workers may require special learning and communication methods, which are being discussed, explained and developed. The trainers need to become aware of the expected demographic developments and the implications those anticipated developments have for the labour market and the respective company/sector. Further are the performance orientation, strengths and weaknesses of older workers being discussed and analysed, including physical changes and cognitive developments, which may affect older workers' ways of learning as well as their work orientations and attitudes. Good practice examples concerning age-related courses should be transferred from and exchanged between different projects. Finally, the trainers produce age-sensitive didactic materials for their own classes. For this purpose, the effectiveness of different teaching and training methods are being discussed and adapted to different learning situations.

The German pilot project 'Smart Region' facilitates the exchange of companies' experiences with different systems of knowledge sharing between older and younger workers. The implementation of this project, however, is faced with two major problems: First, the impact of piloted and successfully implemented measures in terms of economic outcomes is difficult to measure, but key to companies in order to develop new approaches. Second, the dissemination of good practice examples between companies has turned out to be very difficult due to a lack of interest – most companies have a short-term oriented planning perspective and are not aware of the implications of an aging workforce in the medium and longer term.

## **Conclusions and Recommendations**

Despite the fact that the German Federal Employment Agency, other public agencies and the trade unions are important players when it comes to (re)directing employment and training policies to more strongly considering the particular labour market requirements of an aging workforce, companies remain the key actors. They are challenged to adapt their

work organisation, job profiles and training and recruitment policies in order to accommodate the needs of their older employees, particularly in terms of older workers' skilling needs and providing for an adequate work and learning environment.

A precondition for adequately responding to those changing work and training needs is that companies are becoming aware of the demographic shifts and the resulting new labour market requirements. For the vast majority of German companies, however, this is not the case. That most companies rely on a more temporal, short-term planning horizon (typically up to the coming five years) may be one major reason why so far responses at the company level have been minimal. Neither are companies aware of the developments and implications in terms of the gradually increasing proportion of older workers in their particular area/sector/field of production, nor are they concerned about the particular (learning) needs of their older employees. Further are they lacking the knowledge about adequate training provisions and how to facilitate a systematic inter-generational transfer of skills and knowledge in a way that the organisation could derive benefits from it in the medium and longer term. Our empirical investigations related to the Smart Region project have shown that small and medium size companies are particularly unaware of the future demographic challenges and, due to their restricted resources, disadvantaged in terms of providing adequate measures to deal with those challenges. In any case, projecting future developments and scenarios also makes clear that any company measures anticipating aging workforce processes already need to start at the mid-generation. Isolated ad-hoc measures that are targeting the currently elderly or aging workers will not produce sustainable results.

Demographic developments project that in the next thirty years to come all European countries will increasingly rely on older segments of the workforce (SPIDLA 2006). This requires major adjustments of companies' training and recruitment policies. Measures that would significantly enhance the employability of older workers include:

- Impairing early-retirement schemes, which have been boosted in Germany during the 1990s;
- Increasing the retirement age;
- Reducing working hours for older workers;
- Introducing more flexible work schemes in terms of working hours, such as part-time work (LORETTO ET AL. 2005);
- Job rotation;
- Providing incentives to increase older workers' work motivation so that they stay longer in their profession;
- Emphasising older workers' assets and potentials and promoting them as knowledge-bearer;
- Adjusting career management and recruitment strategies in a way that they account for an aging workforce;
- Developing training offers and modules that follow guidelines of a lifelong learning approach;

- Facilitating knowledge dissemination and sharing of good practice examples between companies.

That older workers are satisfied with their work is a key element in fostering their work ability. This will significantly trigger off positive results in terms of their work performance. Awareness raising at the management level is a necessary step to not only keep older workers in work and satisfied with their work, but also to up-date their skills portfolio by involving them in continuing vocational training. Work-life balance and health are issues that also need to be reconsidered against the needs of older workers. In terms of recruitment and human resources development policies new approaches need to emphasise the assets and developmental potentials of older workers and account for their potential role as trainers, mentors and knowledge carrier. In order to implement those approaches, awareness raising among companies remains the key element. Empirical research has shown that rather than following political guidelines, companies are more open to respond to good practice examples of other companies and, above all, by evidence of sustainable economic benefits.

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