

Age Management and Sustainable Careers for the Improvement of the Quality of Ageing at Work

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Abstract. Prolonging working careers by increasing the statutory age for retirement has become compulsory in most Western societies in order to tackle the shrinking of the labour force, preserve economic productivity, foster knowledge transfer and reduce the risks of financial imbalances in social security systems. This imperative currently results in working careers that already exceed 40 years and come to an end after the age of 65 (e.g. in Italy). Over the next few decades, both career length and retirement age are expected to rise. Thus, creating more inclusive workplaces by increasing their quality is the precondition of a win-win situation for both employers and employees, regardless of age. A request for support in the development of sustainable careers from both private and public labour organisations has led to innovating the mainstream methodologies and research tools in the field of age management. Based on the key elements of the mainstream “work ability concept” – i.e. health, competencies, motivation and work organisation – the Quality of Ageing at Work questionnaire (QAW-q), developed by a team from the WWELL Research Centre, broadens its perspective by surveying elements bridging intra-organisational dimensions and which affect employees’ conditions and external socio-institutional constraints: i.e. work-life balance, economic stability, professional identity and relationships in the workplace. The QAW-q is designed to analyse the influence of the different meanings of age (chronological age, seniority within the company and in the labour market) and correlate them with the different dimensions at individual and organisational levels; all these dimensions are weighted by the effect exerted by the passage of time. The results of the QAW-q survey, taken by employees of both private and public companies, serve as a basis for the implementation of measures addressing all the relevant dimensions of the human resource management cycle.

Keywords. Ageing Labour Force, Work Ability, Age Management, Quality of Ageing at Work, QAW, HRM

1. Demographic Change Macro Challenges and their Implications for Work Organisations

The need to develop tools which support employers and managers in coping with the consequences of an older and more age-diverse workforce derives from crucial macro-level changes and challenges. The ageing population trend stems from two main tendencies which are affecting most Western societies – a huge increase in life expectancy since the last century and falling fertility rates from the early 1970s. The

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demographic ageing process is measured as the growth in the relative and absolute share of the older population. At the European level, the number of people aged 65 and over is expected to increase by two million per year over the next few decades [1].

Inevitably, these trends are reflected in the age structure of a labour force which is also growing older, challenging labour market regulation policies and consequently the sustainability of social security systems. Firstly, we consider the question of generational turnover, where problems could arise over the next few years due to the lack of younger people entering the labour market, and the need to maintain and improve the skills and competences of the labour force itself in order to support the competitiveness of production systems [2]. As far as sustainability is concerned, according to Eurostat [1], by 2060 in the EU27 there will be fewer than two people of working age (15 to 64) for each person aged 65 or over; today the ratio is almost four to one. The old age dependency ratios may be further influenced by underemployment or unemployment which reduce the number of persons actually active in the labour market and able to sustain social protection expenditure through tax and contribution payments.

Faced with these trends, the imperative identified by the European Commission [3] is to promote active ageing. The EC defines active ageing as a strategy to make the “ageing well” process possible in ageing societies, which implies working longer, retiring later and more gradually, learning throughout one’s life, being active after retirement and engaging in capacity enhancing and health sustaining activities [4]. In particular, the EC puts the emphasis on activation in the labour market, based on a broad and diversified idea of activity. This includes prolonged productive activity achieved through an increase in the number of years spent in formal employment, as well as bridge employments towards retirement [5], and inclusion in socially (re)productive activities, such as voluntary work or providing post-retirement care [6; 7].

Although the concept of active ageing is multidimensional in itself, labour market participation still represents its most crucial dimension. Given that prolonging work careers is becoming increasingly crucial for the social and economic sustainability of Western societies, the inclusion of older workers in the labour market is necessary both from a social and personal perspective. Due to improved living conditions and increased well-being in old age, a growing number of workers want to remain active for longer in the labour market. According to OECD and EC, work participation underlies individual well-being and social inclusion [8], and represents – at the same time – the most effective contribution of individuals to the collective well-being and sustainable development. What emerges, therefore, is a need to keep people in work longer in order to expand the workforce, together with a need to promote more inclusive workplaces for people of every age. Better working conditions for older workers represent a pre-condition for achieving these goals.

These demographic trends, and the needs which arise from them, have the same implications throughout EU, although they affect member states to different extents and at different speeds. Italy (together with Germany) is one of the countries where the ageing process has been faster and has led to more significant consequences. The percentage of over-65s is expected to reach 25.5% by 2030, and the old age dependency ratio is expected to rise to 41.1% by 2030 and 56.3% by 2050. The situation is even more worrisome if we consider the occupational trends. In Italy the employment rate of people aged between 55 and 64 was only 36.6% in 2010, significantly lower than the expected Lisbon target of 50%, as formerly set by the EC.

Nonetheless, the data for Italy seem to describe a labour market that is more inclusive towards workers belonging to the age group 55-64 years than in other EU countries, and also more inclusive if compared to the situation affecting other age groups. In 2013, the employment rate of people aged between 55 and 64 rose to 42.7% while the unemployment rate was 5.7%, but 40.0% for the 15-24 age group, 22.1% for the 25-29 group and 14.3% for people aged between 30 and 34. This is a direct consequence of the specific features of an Italian labour market which remains strongly segmented into an “insider versus outsider” model; the well-protected insiders are those workers employed in medium-sized and large firms, and most are currently individuals in the final phase of their working lives who entered the labour market at a young age with contracts of unlimited duration. Furthermore, by adopting a longitudinal perspective, since the 1980s the labour force participation of those aged between 55 and 64 years has progressively declined, while their relative share of the total workforce has increased. The main cause of this phenomenon has been the widespread use of special early retirement schemes in the 1980s and early 1990s, in order to guarantee more flexibility to firms under economic pressures or in need of restructuring. In other words, labour legislation has permitted large and medium sized companies to let their older employees go before they reach legal retirement age, by channelling them into early retirement schemes. Older employees, for their part, found this economically attractive as they were offered conditions of high financial security. To some degree, the Italian pension system has thus represented a means to address intense labour market pressure and deal with the need for more economic flexibility in the face of inadequate labour market policies. From that time on, “the pressure on the Italian pension system, already affected by continuing demographic ageing, was further increased.” [9]. Decades of labour market policies based on the “young in-old out” principle have led to a situation where, on the one hand, older workers are asked to retire early in order to leave room for the younger ones (especially during economic downturns and increased labour market pressure) while, on the other hand, they need to stay in work longer to preserve the financial sustainability of the social security system [10]. Although it may appear that the current labour market still includes older workers and excludes the young, by adopting a long-term perspective it is clear that the ageing process requires a reversal of labour market policies founded on the “young in-old out” logic, a goal which has become increasingly urgent.

Even though the urgency of the situation in Italy has been evident for decades, the Italian government has had to steadily intervene in order to adjust and correct the pension regulations (wide-ranging reforms in 1995 and 2004). The most recent significant intervention of this type was the recent pension reform, implemented as the very first act by the technical government led by Mario Monti in December 2011. The reform completed the transition towards a contribution-based pension system (versus the previous earnings-related pension system) for all workers starting from January 2012, and reinforced the pay-as-you-go elements. Furthermore, in January 2012 the legal retirement age was raised to 66 years for both men and women in the public sector and 62 for women in the private sector (66 in 2018). The reform also introduced financial disincentives for workers who retire before reaching the age of 62.

The pension reform acted at the macro level of labour market regulation in order to prolong working careers, although this objective has not been respected by other actions implemented to create more inclusive workplaces and better working conditions for older workers. The pension reform was followed by a labour market reform (June 2012) aimed at easing (flexibilising) entry into and exit from

employment. Controversially, it also facilitates the early retirement of late career workers in larger firms, in contrast with the previous modification of the pension system.

Indeed, creating more inclusive workplaces is a condition for the prolonging of work careers resulting in a win-win situation for both employers and employees. If retaining older workers has become compulsory, the need to act at the workplace level in order to transform this obligation into an opportunity becomes more and more crucial, in terms of possibility for the employees to maintain or improve their well-being at work – thus increasing motivation and productivity – and an advantage for the employers in getting the best from their employees, regardless of age, and saving costs due to sickness and/or low productivity.

The goal of promoting inclusive workplaces for workers of every age is mainly addressed through the promotion and implementation of age management policies and practices. In the first European guide to good practices in age management [11], promoted by the European Foundation for the Improvement of Living and Working Conditions (Eurofound), age management is defined as the set of measures that combat age barriers and/or promote age diversity within work organisations. In the second edition of the guide, Naegele and Walker [12] specify:

“These measures may entail specific initiatives aimed at particular dimensions of age management; they may also include more general employment or human resources policies that help to create an environment in which individual employees are able to achieve their potential without being disadvantaged by their age.” (p. 3).

According to Eurofound classification [13], age management refers to different fields of action and to different practices of the human resource management (HRM) cycle, i.e. recruitment, training and development, compensation, job design, workplace design, promotion of health at work, redeployment and transition to retirement. Despite the fact that age management practices may be varied and differentiated according to specific needs and contexts, combating age barriers is seen as the very first step towards the inclusion of older workers within work organisations. This implies a change in attitudes and behaviours towards age from both employees and employers/managers in terms of organisational cultures.

According to institutionalist [14,15] and neo-institutionalist [16] theories, the institutional contexts may influence and limit the possibility of action of institutions themselves when they face external pressures – in this case, work organisations facing the challenges posed by the ageing process. Labour market regulation and the pension system in Italy have encouraged employers to dismiss older employees before they reach legal retirement age. This has also led to an affirmation of clearly defined visions of older workers in the labour market and of the role they can play and contribution they can make in society. These visions are of course also reflected in work organisation culture. Nowadays, the institutional setting in Italy (as in many other Western countries) has completely changed, mainly because of the recent pension reform, and companies have found themselves subject to new regulatory pressures. Changing culture and attitudes is a long-term process, but what the new regulations require employers to do right now is change their behaviour; they must retain their older workers for longer. In order to achieve this, employers need to be aware of how the workforce is changing, the extent to which these changes affect their organisations, and how it is possible to rethink managerial practices in order to transform these

changes into opportunities. Work organisations need to be supported in the processes described above, and this requires the development of new research tools and methodologies in the field of age management, consistent with the features of the Italian socio-institutional and cultural context and its productive system.

2. Concepts and Method Underpinning the Quality of Ageing at Work questionnaire (QAW-q)

Within the domain of studies devoted to analysing the conditions of older workers, several different approaches have been used. On the one hand, most have concentrated – to varying degrees – on measuring changes in work performance correlated with the increase in chronological age of the worker. On the other hand, some other approaches (as mentioned in the first paragraph) have investigated the obstacles to older workers remaining in employment, hurdles which may be addressed by adopting different practices within organisations.

Within the first context, the “work ability” concept refers to its normal meaning – the general attitude towards work – and specific meaning (being able to work) – given that it came about as an analytical tool in the domain of occupational health. The work ability reflects not just an employee’s performance but also the competences and competencies which older employees possess, and which have been accumulated over the years. According to this perspective, Ennals and Hilsen [17] have pointed out, within the scope of an action-research project promoted by the Norwegian National Insurance Service, that the wealth of experience and tacit skills (and tacit knowledge) possessed by the older workers still represent some of the strategic assets of companies. In today’s knowledge economy, the worker’s work ability is, itself, changing. For this reason, adequate intervention tools need to be defined in order to foster the intergenerational processes which can transfer strategic knowledge and skills.

In the second case, the properly-defined “work ability” concept presents several dimensions, sustaining in particular the balance between personal resources and work demands [18]. The search for this balance is characteristic of a whole working life, and the balance itself may vary considerably according to different stages or phases of one’s working life. Ilmarinen describes this work ability concept via the image of a house with four floors and a roof. The roof represents the work ability itself, which is underpinned by four floors.

“Health and physical, psychological, and social functional capacity create the ground floor. The entire weight of the rest of the building rests in the ground floor. [...] The second floor of the building represents professional knowledge and competence (skills). [...] Their continuous development are used to meet the demands of worklife. [...] The third floor contains values, attitudes, and motivation. This floor is all about the balance between work and personal resources, as well as the relationship between work and personal life. [...] The fourth floor represents work and its related factors. It is the larger and heavier floor. [...] On work floor special attention is paid to supervision and management.” (p. 132-133).

Directly drawn from this concept and its constitutive dimensions, the Work Ability Index [19] – WAI – represents a research tool geared to a practical use within the field of occupational health. At the same time, it constitutes a worker’s self-evaluation tool concerning his/her work ability. The adoption of the WAI has spread increasingly since

its first application thirty years ago in its native Finland [20], and has subsequently spread across Europe, Latin America, Australia and the Far East [21]. Today, it still represents the mainstream tool employed to support age management practices, and has several interpretations – in combination with other assessment tools [22] – within diverse research fields (e.g. occupational health, psychology, sociology, organisational studies and economics). Over time the work ability concept has steadily evolved towards a more comprehensive concept of well-being at work, which tends to give a more complete representation of the quality and dimensions of work ability itself [20].

Based on the key elements of the work ability concept (health, competencies, motivation and work organisation), the Quality of Ageing at Work-questionnaire (QAW-q) broadens its perspective [23]. In order not to underestimate the organisational constraints, as often occurs when adopting the WAI as an analytical tool – the QAW concept introduces further elements aimed at bridging intra-organisational dimensions which affect the conditions of employees to their external socio-institutional environment and constraints. In particular, the motivation floor of the original work ability “house” has been replaced by “satisfaction”-related items, while the motivation-related items themselves have been spread across various other sections of the questionnaire. The new “work-life balance”, “employment and economic stability”, and “professional identity” dimensions have been introduced in order to maintain connections between what happens at the workplace level and the external constraints influencing individual perceptions. Furthermore, “relations” with supervisors and colleagues in the workplace have been introduced in order to evaluate the quality of the social dimensions derived from the organisational relational climate. As will be explained in more detail in the following paragraph, the QAW-q also aims at weighting the influence the different meanings that age can assume (chronological age, job seniority in the company and years of payments to social security schemes) on individual perceptions and on the assessment of the organisational performance related to the eight key topics mentioned above. In order to fulfil this objective, the QAW-q has been structured to encompass the “individual”, “organisational” and “passage of time” levels.

3. Structure of the QAW-Questionnaire

In accordance with the goal of addressing the needs which have begun to emerge from Italian companies since the last pension reform of 2011, as described in the first paragraph, the study and initial results presented below are based on the use of the QAW-q as an age management tool focused on the analysis of the effects of the ageing process on the labour force, and at supporting companies in identifying possible critical situations and related solutions. Indeed, the questionnaire is intended to collect information on all the factors affecting working life which could be influenced by the employee ageing process. Consequently, we moved away from the already developed tools of age management (such as the Work Ability questionnaire, mainly focused on occupational health dimensions and work ability components) in order to broaden the range of factors to be included in the analysis. Information on these factors are collected from individuals but analysed by adopting the organisational perspective, so to be able to identify the links between what the employees perceive and what leverages could be identified at an organisational level in order to create better working conditions. As the collected data are interpreted by adopting the organisational

perspective, the QAW-q is conceived of as being addressed to all employees and not only the older ones. In our view, this choice is not in conflict with the general aim of the tool. Indeed, its aim is to understand the influence of chronological age – not only with the meaning of being older – on working life. In addition, expanding the sample within a company makes it possible to compare the situation of different age groups and to identify changes in perceptions which could be a result of the ageing at work process itself. Moreover, our focus is not only on chronological age but also on age measured both as seniority in the company and as years of payments to public pension schemes (in other words, working years left before retirement). The three meanings of age – chronological, seniority and years left before retirement – neither represent issues directly investigated nor the criteria for identifying the sample. On the contrary, age – with its three meanings – represents the lens adopted when analysing the collected data.

In more detail, the QAW-q consists of eight sections, each of which focused on the eight different factors identified as crucial in terms of the process of ageing at work, thus influencing the perception of the quality of work itself. These sections/factors are:

1. Health
2. Work organisation and workload
3. Employment and economic stability
4. Work-life balance
5. Satisfaction
6. Professional identity
7. Relations at work
8. Competences

A final section at the end of the questionnaire collects socio-demographic and organisational data, such as gender, chronological age, educational attainment, hiring year, year since which the employee has started to regularly pay contributions to the public pension system, company department and function. Each questionnaire section (except for the final one) comprises six questions focused on the perceptions of the employees regarding their personal situation, a comparison between past and present and future expectations and an assessment of organisational performance. In this way the structure of the QAW-q intersects the individual and organisational levels, and the influence of the passage of time. To be more precise, for each section/topic:

- the first three questions ask the employee how s/he perceives his/her personal condition concerning different sub-themes related to the main topic of the section;
- the fourth and fifth questions focus on the time effect - the fourth asks the employee to evaluate his/her current personal situation compared to five years previously, while the following question analyses future expectations for the next five years (assuming s/he is staying with the same company);
- the last question asks the employee to assess company performance in promoting good conditions at work as related to the topic of the section.

Each single item within each section uses rating scales, so that the questionnaire produces scores for each section/topic and a total which express a measure of the perceived quality of working conditions. The collected data are analysed via mono, bi, and multivariate statistical techniques by using socio-demographical and organisational variables as predictors: e.g. chronological age, seniority, gender, educational attainment and so forth, in order to enable comparison of conditions among different employee groups. The scores are used to identify and predict possible critical issues, defined as

such when analysed by adopting the three ages lens. In other words, it allows us to identify critical areas for different groups of employees, but also to predict situations that could become critical when considering the employees' ageing process and the increasing number of a company's older employees in the future. Moreover, from the scores taken from the final questions in each section, designed to assess organisational performance, it is possible to predict in what areas the company has most room for improvement (according to employee perceptions), and identify the leverages upon which the company could act in order to cope with the critical situations, as flagged up by the lower scores from, above all, the first three questions (personal/individual condition). Currently, according to the amount of individual data collected from private and public companies through the QAW-q (N. = about 3.000), a general benchmark threshold score has been identified, although the tool has been used to provide analysis at the single company level, and not to make comparisons between companies. A higher quantity of data from companies belonging to the same economic sector will allow us to establish more significant thresholds to be used for comparison in the future.

As the tool has been specifically developed in order to support the HR processes within work organisations, the use of the questionnaire as a survey tool is discussed with management (human resource managers or employers) right from the early stages and before implementation. The QAW-q is divided into sections which are designed to ensure an effective use of the tool; nonetheless, by keeping the same methodological framework (type of question within each individual sections) it is possible to personalise, include additional sections or exclude existing ones, and focus on new topics of specific interest for the company. The results produced from the questionnaire can be presented in a easily understandable format as the starting point for discussing emerging criticalities with the management. The idea underpinning the use of the tool is that it represents the starting point for a more complex process of analysis, which includes multivariate analysis of the scores, but also opens into new research phases addressed at deepening the questionnaire results, and possibly also encompassing the use of qualitative methodologies.

4. Discussion of Initial Results

The data collected through the QAW-q, in direct relation to its structure (as explained in the previous paragraph), produce different indices. For each of the eight sections/topics:

- an individual index (QAW-individual), calculated as the average of the scores of the responses to questions from 1 to 3 (1 to 10 scale); the individual index may therefore vary from a minimum value of 1 to a maximum of 10;
- an indicator of perceptions associated to past experiences and future expectations (QAW-past/future), calculated as the sum of the scores of the answers to questions 4 and 5 (1 to 5 scale); the past/future index may vary from a minimum value of 2 to a maximum value of 10;
- an index of organisational performance assessment (QAW-organizational), which is the score of the answer to question 6 (1 to 10 scale); the organisational index may therefore vary from a minimum value of 1 to a maximum of 10;

- an overall score (QAW-total), resulting from the sum of the first two indices, which can therefore vary from a minimum value of 2 points to a maximum of 20.

The mean value of the QAW total scores from the eight individual sections represents the general QAW-total index.

The analyses presented here are based on a total of ten work organisations where the QAW-q were administered between the end of 2012 and the end of 2013. One of the work organisations belongs to the manufacturing sector, five to the services sector and four to public administration (local authorities and municipalities). The surveys collected 3,023 individual questionnaires valid for the calculation of the QAW-total index (out of a total of 4,072 questionnaires). Currently, the QAW-q is still being carried out within several multinational companies belonging to different economic areas. It should also be noted that the calculation of the total index presented here excludes the scores from the “employment and economic stability” section, as some organisations deemed it inappropriate to collect opinions on this topic from their employees.

A preliminary look at the descriptive dimensions of the sample, based on the answers provided by the respondents from the ten companies, yields the following statistics:

- gender (No. = 3,365), male – 45.3%, female- 54.7 %;
- profession (No. = 3,351), clerks – 89.1 %, blue collar workers - 6.1%, and other operational professionals - 4.8%;
- economic branch (No. = 4,072), 7.1% of cases refer to manufacturing, 12.1% to services and 80.8% to public administration.

As far as age is concerned, with regard to chronological age (N. = 3,327), results show an average value of 46.18 years (mode 43, the first quartile at 40 years, the median at 47 and the third quartile at 53); with regard to job seniority (N. = 3,298), an average value of 17.71 years (mode 23 years, first quartile 9 years, median 17 years and third quartile 25 years); and finally, with regard to the contribution period (N. = 3,313), an average of 23.20 years (mode 26 years, first quartile at 15 years, median at 24 years and third quartile at 31).

The mean score of the QAW-total index regarding the 3,023 valid cases is 12.52, a score which can therefore be used as a benchmark, and has a higher value:

- among males (12.65) rather than females (12.41);
- among blue collar workers (12.8) rather than other operational professionals (12.58) and clerks (12.51);
- in services (12.90) rather than manufacturing (12.72) and public administration (12.42).

With regard to the scores at individual work organisation level, both the best (13.71) and worse (12.30) performers belong to the private sector (services branch).

The first general result that stands out from the collected data is the inverse (negative) relationship between the scores of the QAW-total index and all dimensions related to age factors. In particular, the closest association is found with chronological age, with a Pearson correlation coefficient $r = -0.165^{**}$, significant at 0.01 level, while less intense is the correlation with both the seniority ($r = -0.134^{**}$, significant at the

0.01 level), and with the contribution period ($r = -0.146^{**}$, significant at the 0.01 level). Moreover, linear regressions, in all the cases significant at $p < 0.001$ level, show that the QAW-total score decreases by 0.031 points per unit of chronological age increase, by 0.022 points per unit of seniority growth, and by 0.024 points per unit of contribution period increase.

5. Concluding Remarks

In the light of these initial results [23], age – and in particular the ageing process – seems to influence the perceived quality of the work experience following a negative trend; as workers grow older their perception of the quality of their work experience gets worse. In particular, the two topics of “competences” and “professional identity” are those where the older workers show the lowest scores while, to some extent surprisingly, the health factor does not display such large differences in scores between the youngest and oldest groups. Moreover, it is not only the chronological age which has such an effect, but also, and especially, age in terms of years of payments to the public pension schemes. The implication is that the more individuals are socialised to the work experience, the more negative is their perception of the quality of work they are experiencing. Indeed, this also reinforces the idea that we need to consider age not just as chronological age, but also in its multiple meanings within an organised social environment (as represented by a company).

From the methodological point of view, some of the characteristics of the QAW-q may represent both strengths and weaknesses of the research process. Above all, the questionnaire in its basic structure is composed of just 48 items and is easy and quick to complete. A second important point is that the questionnaire could be perceived as too generic by the employers. This may be a result of two of its main characteristics: the fact that the questions do not explicitly address the age issue (conversely, it represents the perspectives adopted while analysing the results) and that, despite being used as a tool for supporting age management, it is not directed solely towards the older workers. On the other hand, what we have presented as possible weaknesses are a result of specific research design choices. Indeed, age is a fundamental variable which influences everyday working life, but its being fundamental is grounded in the interaction between the age variable and other socio-demographic and organisational variables, namely the individual characteristics of the employee (e.g. age combined with gender, job seniority and educational attainment), the organisational structure of the company, the organisational culture and so on. The same is true for age management practices; they do not differ from generic HRM practices. What is mostly different is the focus adopted when management plans and implements specific measures to deal with criticalities related to the age factor. Moving on to the second point, the choice to develop a questionnaire directed at all staff and not just seniors, stems from a decision to avoid the risk of the tool being perceived as stigmatizing if used only in connection with workers belonging to a specific age group; we also avoided the possibility of worker apprehension regarding possible managerial decisions arising from the results of the questionnaire.

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