



The Voice  
of European  
Railways



European Rail  
Infrastructure Managers



# EMPLOYABILITY IN THE FACE OF DEMOGRAPHIC CHANGE – PROSPECTS FOR THE EUROPEAN RAIL SECTOR

A practical guide to design the future

English



With support from the European Union



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# FOREWORD

The European Union has agreed on an employment rate target for women and men of 75% for the 20–64 years age group by 2020: an ambitious commitment that is nevertheless essential to ensure the sustainability of Europe's social model.

Bridging the gap to the target will be no easy task. The crisis has brought the employment rate down and the unemployment rate up. In several Member States fiscal consolidation efforts are reducing the capacity of public authorities to prop up domestic demand. However, it is vital for Europe to re-enter the path of growing employment that was suspended by the onset of the crisis in 2008. With declining fertility rates, the EU working age population will start shrinking as early as 2012. Improving the match between the skills of the workforce and emerging labour market demands is an essential step towards meeting the ambitious 75% target, as highlighted in the flagship report just adopted by the Commission on „New Skills and Jobs“. EU employment and skills policies that help shape the transition to a smart, green and inclusive economy must be a matter of priority. Social partners play a key role in these policies at cross-industry, sectoral and company level.

The European social partners in the rail sector have engaged in a joint project on „Employability in the demographic change – Prospects for the European rail sector“ that the European Commission was happy to support. In the context of the challenges mentioned above, the European rail sector has to adapt to technological progress and a rising demand for transport. These challenges require strategic responses from companies in which the upgrading of workers' skills play a crucial role. However, injecting more skills into the labour market is not sufficient. Skills also need to be adapted to the needs of business and people, too. Therefore, we need to anticipate future challenges and opportunities and look at how these affect the skills and jobs of tomorrow.

In their project, the European social partners in the rail sector ask the right questions: How to balance the skill needs of companies and the skill needs of individual workers? How to promote equal access to skills and learning, recognising that people have different needs, situations and goals? How to better match skills with existing jobs and new jobs? What incentives are needed for companies and workers to invest in lifelong learning?

Existing good practices can help to find appropriate answers for the future. This project is one step in the right direction. It collected good practice examples for employability measures which human resources managers and employees in the sector should look at. While recognising that the identification and choice of these good practices was a task on its own, we strongly encourage the European social partners in the sector to actively promote the project results amongst their respective affiliates. Only then will the joint project be worth of the efforts made and have a tangible effect on the European railway companies' and workers' daily reality.

Armando Silva



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# FOREWORD

A European social dialogue, a fruitful exchange of views between employers and workers, is crucial for our daily work and the work of our members. That is why the Community of European Railway and Infrastructure Companies (CER), the European Transport Workers' Federation (ETF) and the European Rail Infrastructure Managers (EIM) are actively engaged in promoting a social dialogue on a European scale. The results achieved so far show that we are moving in the right direction. CER and ETF signed two agreements in 2004 which became two European directives: the first one on working conditions was implemented by the Council, the second one on the certification of train drivers became the drivers' license directive as part of the third railway package.

We believe that the changes – as outlined by the agreements – can only be successfully converted into the railway sector if, on the one hand, the employees and the companies are motivated to participate in this process, and on the other hand an effective and healthy social dialogue between employers, trade unions and workers is established.

This is the fourth project the social partners have developed on employability. The first two projects outlined the fundamental concept for human resources management in the railway sector. The joint recommendations on employability signed by CER and ETF in 2007 outline our common views on this issue. The third project organised a conference on employability as an HR strategy for shaping change in the railway sector. It was designed to implement the joint recommendations.

This fourth project focuses on employability and demographic change. Its objective is to present ideas and possibilities to handle the topic in the companies. The development of the project demonstrated that the ongoing demographic change with all its implications has already become a challenge for human resources managers and a topic for the trade unions in the railway sector. It is important that the social partners share this opinion.

Looking ahead, the different aspects discussed within the joint working party and presented during the final conference such as continuous education and training, health promotion, working conditions as well as recruiting and retention will be decisive, not only in the railway sector, but also in the industry sector as a whole. Issues such as 'company culture', 'leading culture', 'diversity' and also 'employability' were considered as 'soft' topics in the past. Today, these issues are becoming 'hard' topics, even subject of collective negotiations and thus they can significantly influence the success of a company.

The good work done so far underlines the need for a continuous exchange of views to define good practices and recommendations on the most pressing matters at a European level. This is why CER, ETF and EIM will continue to promote a European social dialogue in the future.



  
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# INTRODUCTION

The topic “Employability” is one of the most important for the work of the social partners in the European Sectoral Social Dialogue for the Railways, CER, EIM and ETF.

Drastic changes in the economy and society in Europe since the nineties require a response from companies and employees. With the liberalisation and globalisation of the markets the pressure of competition on rail companies and their employees has risen. On the one hand this development of the economy is leading to restructuring, outsourcing or privatisation and results in a reduction of staff in many companies. Due to technological progress this process will continue. On the other hand the companies in many European countries have been experiencing a shortage of staff in some areas for several years due to the demographic change in the development of the society. Neuralgic points are the recruitment of junior employees and railway-specific services. The average age of the staff is increasing, pension ages tend to rise and junior employees are getting rare. Know-how has to be kept in the company and has to be promoted.

Wherever possible, retraining for new roles and areas of employment was used as a tool in restructuring processes. But the use of this tool was very often limited by practicalities, because it turned out all too often that many employees were not or not sufficiently “employable”, when their activity was discontinued, and consequently they failed in their occupational reorientation.

The European Commission, social scientists and labour researchers as well as various companies from various sectors had identified this phenomenon, and social policy considerations therefore focused on education policy objectives and the need for “lifelong learning” as well as the development and promotion of “employability”.

In 2000/2001 and 2005/2006, the social partners in the European railway sector carried out two EU-funded projects on the issue of “employability”. While the first project aimed at identifying answers to the question of whether “the employability concept is usable for the European railways” – with a consistently positive outcome –, the second project analysed case studies describing actions taken in a “controversial area for companies and employees as regards transport safety, social security and profitability”.<sup>1</sup>

It would exceed the scope of this introduction if we attempted to describe all outcomes of both studies, but it would be useful to mention four particularly important insights, as they provided the motivation for the objectives and activities of this new project:

- In October 2007 the social partners adopted “joint recommendations”.<sup>2</sup>
- In future and in all companies in the sector, employability should be one element in the mission statement of modern HR policies.
- The previously widespread misunderstanding confounding the “capability to work and employability” of employees was identified and will have to be more intensively considered in future, and
- Employability is based on two pillars: prevention and sustainability

To implement the “joint recommendations” the social partners organised a conference in 2008 within a third project. The conference title was “Employability – an HR strategy for shaping change in the railway sector”.<sup>3</sup>

In addition to the objectives of the first projects, i.e. of finding ways to confront job losses or vacancies with suitable measures, it is now necessary to integrate a new problem area: demographic developments in the railway companies.

On the one hand, it will be more and more difficult for the railway companies with their largely consolidated workforces to recruit young employees and, on the other hand, it will be a matter of retaining the increasing share of older employees in the companies for a longer period of time. From the companies’ perspective, this is a matter of ensuring the highest possible continuity of knowledge, health and skills – including the need for knowledge transfer. From the employees’ perspective, it is a question of whether they are able to adapt to new demands of the working environment.

<sup>1</sup> Download of the reports for example at: [http://www.eva-akademie.de/dcms\\_downloads/rail-employ\\_fallstudien\\_de.pdf](http://www.eva-akademie.de/dcms_downloads/rail-employ_fallstudien_de.pdf) and [http://www.eva-akademie.de/dcms\\_downloads/1267191704\\_rail\\_employ\\_results\\_english.pdf](http://www.eva-akademie.de/dcms_downloads/1267191704_rail_employ_results_english.pdf)

<sup>2</sup> Download of the recommendations at: <http://www.itfglobal.org/etf/rw-employability.cfm> and [http://www.cer.be/media/071004\\_employability.pdf](http://www.cer.be/media/071004_employability.pdf)

<sup>3</sup> Download of the results under: <http://www.itfglobal.org/etf/rw-employability.cfm> and [http://www.cer.be/media/1966\\_conference%20report%20employability\\_en.pdf](http://www.cer.be/media/1966_conference%20report%20employability_en.pdf)

In 2009 – and in fulfilling their voluntary obligation to engage in “follow-up actions” –, the social partners decided to carry out the new project entitled “Employability in the face of demographic change – Prospects for the European rail sector”, which also received funding from the EU Commission. The aim of this project is to provide personnel managers and employee representatives with practical impetus and ideas to handle the topic of employability and demographic change in their companies.

While the first two projects had been carried out by researchers and with the participation of colleagues from the railway companies and the railway unions, this project aimed at developing good practices in bilateral workshops involving experts from corporate practice (employers and employees) as well as scientific support and consultation. The practical work was accompanied by an extensive survey of railway companies and trade unions regarding employability and demographic change within the staff of the European rail companies. The results reflect the relevance of the topic and the demand for action.

The project work was managed by a steering committee composed of employer and union representatives. With the social partnership structure the project could guarantee that all issues relevant to both sides find their way into the project focus and results. The working group of the persons involved in the project will continue to act as a competency network on issues of employability and demographic change after the term of the project ends. The fact that they deal with the wide range of aspects of the topic enable them to support and inform others.

Furthermore social partners’ initiatives regarding employability shall be continued in the future. The European social partners already agreed on its continuation. The project with its practical ideas is useful as a door-opener for further activities and joint work. Not only was co-operation between the social partners was strengthened with this project, but also the communication with the European institutions was deepened and will be continued.



# DEMOGRAPHIC SHIFTS IN EUROPE AND THEIR EFFECT ON EUROPEAN RAIL COMPANIES

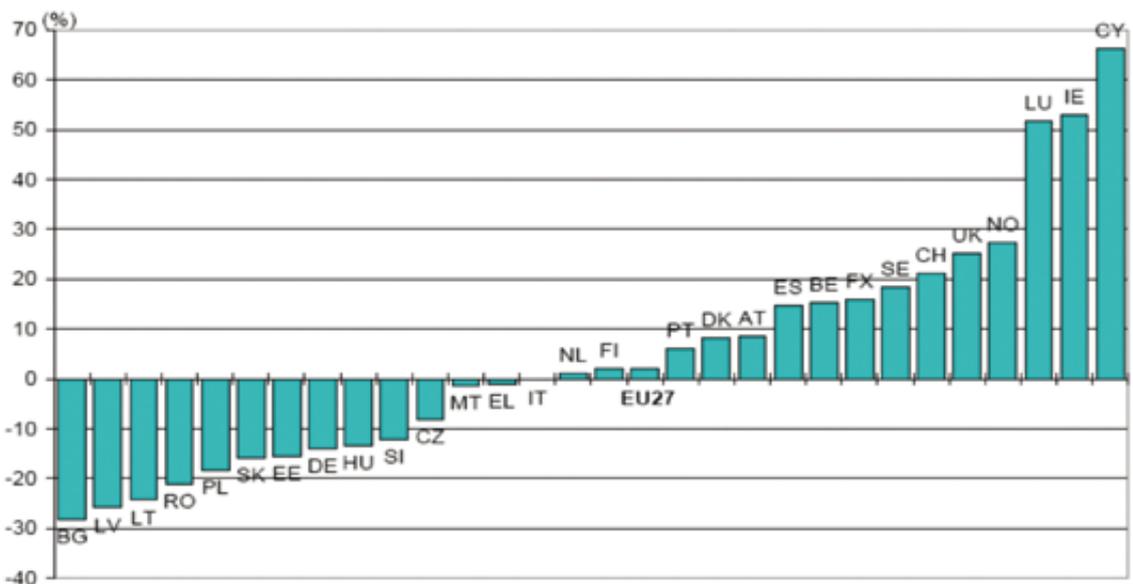
Interest in the concept of employability in theory and practice in Europe is based not only on the challenges posed by globalisation, with its different market and production conditions and its continuous evolution of manufacturing processes, but also on demographic change and on a European population that is

gradually ageing. To familiarise ourselves with the parameters of our subject we consider here the prognoses for European demographic trends and for the employment situation within companies in general.

## Population trends in Europe

The EUROPOP2008 convergence scenario forecasts a rise in the total European population from 495.4 million in 2008 to 520.7 million in 2035 followed by a drop to 505.7 million by 2060. Projections anticipate that the median age of the population will increase, rising from an average of 40.4 years in 2008 to 47.9 years in 2060. Over the same period the proportion of people aged 65 or over will rise from 17.1% to 30%, reflecting an increase in the number of people living beyond the age of 80 from 21.8 million to 61.4 million – an almost three-fold increase.

Notwithstanding predictions that the population of Europe in 2060 will be 2.1% greater than it was in 2008, demographic change in individual countries will be extremely diverse (see Table 1). Estimations are that fourteen countries will experience an overall drop in population between now and January 2060. In sixteen countries a growth in population is predicted. Companies in countries where a reduction in population is anticipated will find it increasingly difficult to recruit staff, in particular young people entering the job market



Source: Eurostat, EUROPOP2008 convergence scenar

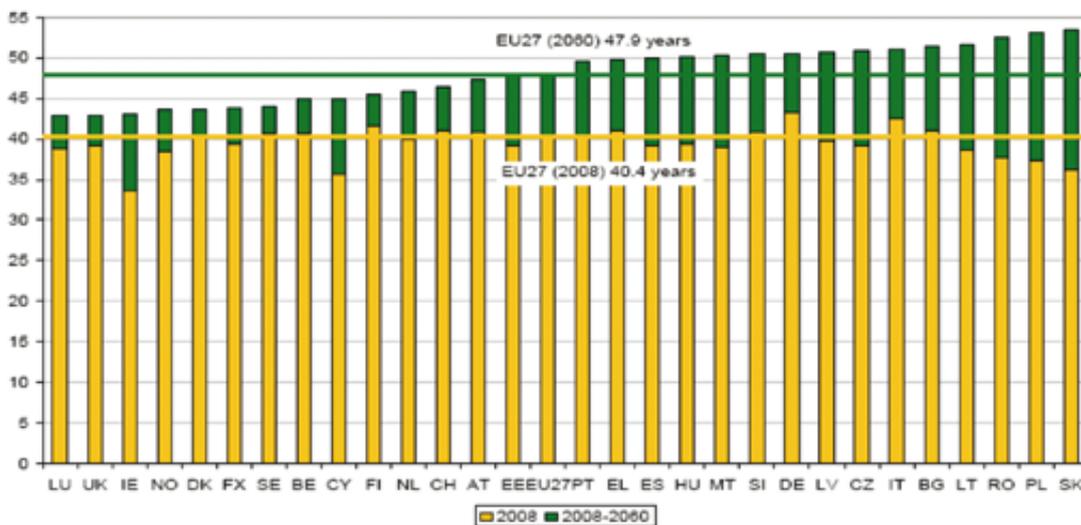
**Table 1**  
Projected total population change over the projection period 2008–2060 (2008=100) for the EU Member States, Norway and Switzerland <sup>1</sup>

1: BG-Bulgaria, LV-Latvia, LT-Lithuania, RO-Romania, PL-Poland, SK-Slovakia, EE-Estonia, DE-Germany, HU-Hungary, SI-Slovenia, CZ-Czech Republic, MT-Malta, EL-Greece, IT-Italy, NL-The Netherlands, FI-Finland, PT-Portugal, DK-Denmark, AT-Austria, ES-Spain, BE-Belgium, FX-Metropolitan France, SE-Sweden, CH-Switzerland, UK-United Kingdom, NO-Norway, LU-Luxembourg, IE-Ireland, CY-Cyprus

A further development – the ageing of populations – is expected to affect all countries of Europe (see Table 2). The median age of the population is expected to rise in all countries without exception. A number of factors are combining to produce this effect – the existing age structure of the population combined with a low birth rate and a larger number of people living to an advanced age. In the period from 2008 to 2060 the average age of the popula-

tions in Poland and Slovakia is expected to rise by 15 years. In Luxembourg, the UK, Denmark, Metropolitan France, Sweden, Belgium and Finland the average age is expected to rise by less than 5 years.

The ageing process is also visible in the age structure of the projected population. The population segment comprised of people older than 65 will rise in all countries, in most by at least 10%.<sup>2</sup>



**Table 2**  
Median age of the total population of the EU Member States, Norway and Switzerland – 2008, 2060

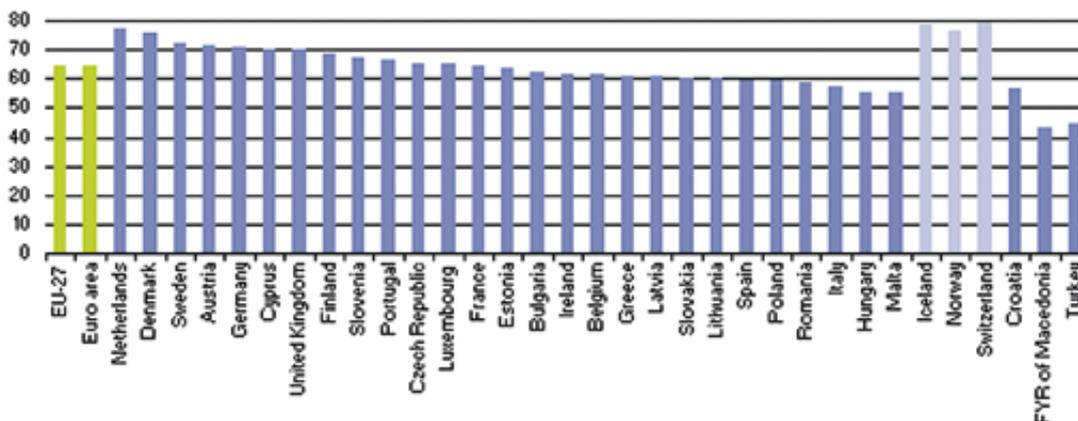
<sup>2</sup> Source: [http://epp.eurostat.ec.europa.eu/statistics\\_explained/index.php/Population\\_projections](http://epp.eurostat.ec.europa.eu/statistics_explained/index.php/Population_projections)

Source: Eurostat, EUROPOP2008 convergence scenario

### Employment rates in Europe

In a study of employability an examination of demographic trends should be accompanied by a study of employment trends. Across the 27 EU member states employment rates dropped from 65.9% in 2008 to 64.6% in 2009. The financial crisis and the effect it had on economic activity contributed to this

situation. With its Lisbon strategy the European Council hoped to achieve an employment rate of 70%. In 2009 Denmark, the Netherlands, Sweden, Austria and Germany all reported employment rates of 70% or more. In Malta, Hungary, Italy, Romania, Poland and Spain employment rates remained below 60%.



**Table 3**  
Employment rate of persons aged 15-64 years, 2009, %

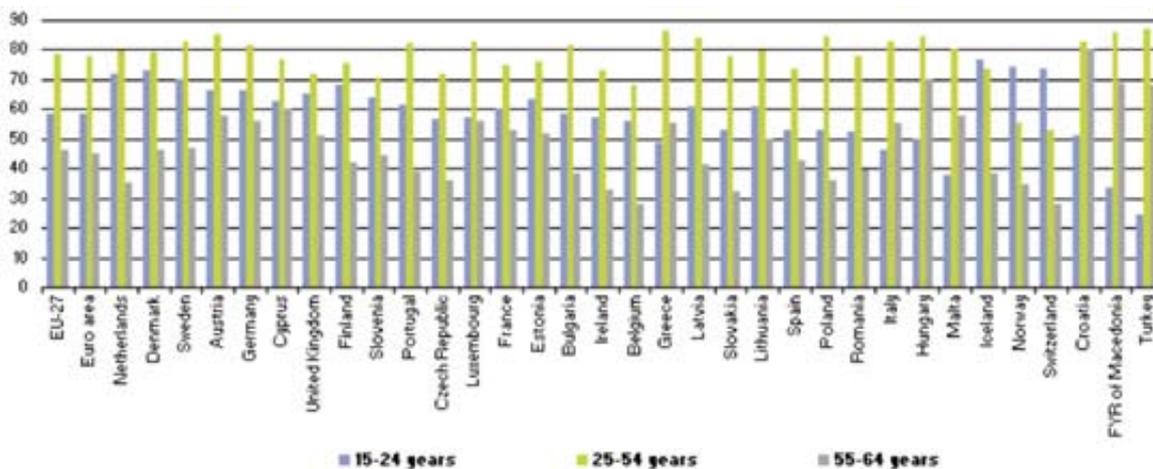
Source: Eurostat (lfsi emp a)

Rates of employment are generally lower for women and for older persons. While the employment rate in 2009 for men was 70.7% in EU-27, for women it was only 58.6%. When set against the first statistics produced by Eurostat in 1998, the employment rate for women has risen by 7.1% from its 1998 figure of 52% while that for men has risen only 0.4% from 70.3%.

Older employees, defined here as people between the age of 55 and 64, were employed at a rate of 46% in 2009. In 2001 the figure was a mere 40%. Hungary, Croatia, Macedonia and Turkey posted rates of over 60%. In other countries – the Netherlands, Portugal, Czech Republic, Bulgaria, Ireland, Belgium, Slovakia, Poland, Iceland, Norway and Switzerland – the figure

is very low (under 40%), and where these countries also have a low birth rate and a rapidly increasing average age companies clearly have to take action.

There are a number of reasons – health, family obligations, training requisites or lack of motivation – why people in the 55–65 age bracket may not be in gainful employment but could be if they wanted to. Where health risks are concerned, recent years have seen a rise in the proportion of ailments represented by mental health issues. On the other hand, many older individuals looking for work are not given an opportunity on the job market. Youth unemployment is another phenomenon that has risen alarmingly in many countries and has a significant effect on employment rates.



**Table 4**  
Employment rate by age group, 2009, %

Source: Eurostat ([lfjs\\_emp\\_a](#))

The skills and qualifications possessed by a population are an important factor in determining the employment rate. Across the EU there is an 84.5% employment rate for people in the 25–64 age bracket who have had tertiary education as defined by the ISCED. This figure is significantly higher than that for people entering the job market with only a primary-school or

secondary education (54.7%). As a rule, tertiary education as defined by the International Standard Classification of Education (ISCED) entails a completed course of study. Individuals with a medium level of education are represented by an employment rate of 73.7%.<sup>3</sup>

<sup>3</sup> Source: [http://epp.eurostat.ec.europa.eu/statistics\\_explained/index.php/Employment\\_statistics](http://epp.eurostat.ec.europa.eu/statistics_explained/index.php/Employment_statistics)

## Conclusions for the rail companies of Europe

The prognosis for ageing and employment-rate trends set out here also concerns the rail companies of Europe and their workforces. Countries whose populations are on the increase and where the average age is hardly rising and not yet particularly high will experience the fewest problems in filling job vacancies. This is the case in Luxembourg, the UK, Denmark, France, Sweden and Belgium, where the average age is expected to remain below 45 years and to have risen by less than 5% by 2060. In contrast, in Hungary, Malta, Slovenia, Germany, Latvia, Czech Republic, Italy, Bulgaria, Lithuania, Romania, Poland and Slovakia the size of populations is expected to have fallen and the average age to have topped 50 years by 2060. This clear rise in the average age in many countries will enforce another predicament – the average age, already very high, of the workforces of most European rail companies.

As part of the Project “Employability in the demographic change – prospects for the European rail sector” a survey has been conducted regarding employability and demographic

aspects in the rail sector. The 35 sets of responses that we have received from HR managers representing management and from unions in 19 European countries have produced a clear picture, even if the interpretations drawn from it do not have the status of a formal, statistical analysis. In workforces totalling 812,366 employees

- 54% of employees are older than 45 and
  - 34% are already past the age of 50.
- Within 10 years – 15 at the latest – this segment of workers will have left the workforce. Whether workers in this age bracket continue in employment for the entire period will depend on whether they can continue to perform their tasks right up until retirement and whether working conditions and their health permit this. There will be special problems where these workers are employed in physically stressful jobs. Another factor to consider in this regard is the age of retirement, which differs between countries (and often between occupations) and affects the total number of years spent in a company.
- Employees under the age of 34 number 154,386 and represent 19% of workforces.

**Total number of employees by age brackets**



**Table 5**

Source: Findings of survey conducted as part of 2010 Project “Employability at a time of demographic shifts“

Of the 34 survey responses, 27 express the opinion that demographic shifts have already affected the recruitment of staff within the company or will affect recruiting in the future. If a company has a workforce of an advanced average age and if it has recruitment problems for certain occupation groups, the

company must have strategies for tackling the problem. One conceivable strategy concerns the concept of employability, which helps to match the demands of a job with the personal and professional skills and individual state of health and physical capacity of the staff.



## The meaning of the concept of “employability”

A high degree of employability in times of demographic change implies the elaboration of a stringent set of pre-requisites that will enable people to meet the current and future demands of the labour market. The ageing of workforces over the coming years and extensions to the retirement age are affecting not only individuals’ plans for their lives but also the demands placed on employees at the workplace. It is becoming increasingly important for individuals to act on their own initiative and take responsibility for their own professional development and future. The notion of employability addresses capacities, skills and qualifications that can be acquired and built on. In short, this is the way to maximise one’s opportunities within a company and in the labour market as a whole.

### Corporate culture

In the course of this project it became clear that a number of factors are decisive if employability is to be successfully pursued. It is essential that company managements handle the themes of demographic shifts and employability and pursue policies in a competent way. The subject should be an integral part of company philosophy and be borne by all employees in equal measure. The approach has to embrace the working lives of all employees, not merely those of the more elderly workers. Though the focus be on prevention, special measures must be taken to address the needs of older employees. Experience from both sides shows that this will have a positive effect on the workforce and on the company.

The survey reveals that there is still considerable disparity in the extent to which companies are addressing the theme of employability. Two thirds of companies state that they have no internal guidelines or policies relating to their ageing workforce. Nonetheless, a little under a third have arrived at collective agreements or drawn up guidelines regarding, for instance, the time before retirement or the recruitment of young staff.

### Planning of measures

Applying the concept of employability requires careful planning and concerted measures. The process must be borne by all parties – companies, workers, works councils and unions. An approach that emphasises social partnership will improve the relationship between employees and management and hence enhance social dialogue. Support from management coupled with communication at all levels of the company is crucial if the idea of employability is to be asserted in a sustainable way. Follow-up evaluation will analyse the cost and benefit. Support can also be provided in the form of a policy framework at national level. Rail companies need to create meaningful

work opportunities for their older employees. Staff must be motivated to stay in employment for longer. This motivation is closely linked to the quality of the workplace and can also be stimulated by financial incentives.

The findings of the project and survey reveal that many rail companies have already introduced measures designed to improve their workers' level of employability. However, measures aimed at more elderly employees are not as common as those targeting all employees.

The survey showed that it is quite common for rail companies to compile overviews of their workforce along age lines. Moreover, 74% of companies who responded to the survey draw up prognoses for staffing requirements.

#### **Promotion of health**

Keeping employees healthy and able to work is key to maintaining the employability of staff. Work-related inhibitors of health must be avoided, but employees, too, must be aware of the important part that their own state of health plays in a balanced, harmonious life. Such awareness will not only help employees to stay healthy longer; they will also be more motivated and happier in their work.

That the area of health promotion is fundamental to conserving energy and staying fit for the job at hand has been taken on board by companies and employees alike and has led to further steps being introduced in some companies. On top of the laws to be observed in this regard, half of the companies who participated in the survey have already introduced measures fostering the health of their workforce. This is mirrored in the list of best-practice examples compiled by companies in the area of health promotion.

#### **Organisation of work**

Companies can optimise working conditions by introducing structural and organisational changes. Promising ways to increase people's motivation to remain in employment are the introduction of flexible working hours and new methods in the organisation of work in general. For the employee this results in positive employment prospects and with it an improvement in the retirement situation. Companies can stabilise their sources of staff and reduce absenteeism and voluntary retirement. Teamwork is strengthened, productivity raised. The company's image is boosted.

At present, implementation in this regard focuses largely on working hours and decisions regulating the transition from job to retirement, as we see in the survey. There are few examples of special measures targeting older employees, those who work

in particularly stressful workplaces, for instance. Analyses of workplaces rarely consider the special needs of older employees and there are few instances of work processes taking account of their special requirements.

#### **Further training**

Further training courses enhance the employability of workers and widen their options when it comes to choosing attractive jobs. Lifelong learning is now the order of the day. Passing on knowledge to one's colleagues benefits all parties. Schemes for developing the skills of employees not only enhance their sense of belonging and loyalty but also can be integrated into HR planning in the separate departments of the company.

The project survey shows that the majority of companies take steps to develop the skills and qualifications of their workers, even if these measures are not part of an over-arching strategy. There are next to no further-training opportunities for older employees, with most courses targeting all employees. A study of good practice shows that important components are still lacking in this area. An example would be concrete proposals for projects providing training in extra-disciplinary and poly-disciplinary areas. Companies still tend to underestimate the value of these training measures.

#### **Measures for women**

The problems associated with demographic shifts will remain unsolved in the future unless women are employed more in the rail sector. A number of measures have been taken at national and European level to address this issue, but more commitment is needed if many workplaces and jobs in the rail sector are to be made attractive to women. This subject is the focus of another project involving the social partners, since the diversity of approaches and the acute need to improve the situation go beyond the more general remit of this project. All ideas, suggestions and examples mentioned in this report apply equally to men and women.

# THE METHODOLOGY OF THE GUIDE

The initiators of the guide aim at presenting good practices to promote the employability of the employees and to make these good practices available to decision-makers in companies and trade unions alike. The examples, which were collected during the project duration by the involved partners, are meant to impart ideas and to inspire the discussion.

The projects and initiatives compiled in this guide are field-tested in the presenting companies. They met with mutual approval of the management and the employees. The guide should be understood as a collection of ideas and suggestions which can be adapted to the patterns and customs in specific companies and realised accordingly. Not all of them will be usable everywhere, but possible variations will provide conceivable options. The collection is not exhaustive, but is intended to inspire further approaches. The social partners have to decide which examples are usable in their company and how they can be implemented.

At the end of each example you will find the contact details of the responsible person in the company or in the union, with whom you can get in contact. In addition, you will find a list with all contact details of those persons who worked on this project and helped to collect and write the practice initiatives and projects. With all these persons a network of experts and supporters was created, who can provide information about the topic employability in a competent way. The term “employability” is used in this guide as “the ability to participate in the professional and working life”. What is relevant is the level, how well the demands of the working environment match the personal and professional competencies and the individual’s health and working ability.

In view of this compilation, areas have been identified, where examples of good practices may be used as a recommendation for action by HR managers and employees. In an exchange of experience, the emphasis was placed on the following areas:

- Recruitment and Retention Activities
- Further Education and Training Schemes
- Health Promotion
- Working Conditions

These areas offer a wide coverage of employability as a comprehensive thematic area and can be found in the structure of the chapter “good practice examples” in this guide. Further starting points have to be considered as well while dealing with employability. Management and employees have to be aware of the topic. A joint approach that finds its way into the company policies and is supported by the management is necessary. In addition to the European social partners, ETF, EIM and CER, and EVA Academy, the following companies and trade unions participated in compiling the results:

<b>AUSTRIA:</b>	Vida
<b>BELGIUM:</b>	Secteur cheminots de la centrale générale des services publics (ACOD-CGSP)
<b>BULGARIA:</b>	Federation of Transport Trade Unions in Bulgaria (FTTUB)
<b>FRANCE:</b>	Société nationale des chemins de fer Français (SNCF); Fédération générale des transports et de l’équipement (FGTE-CFDT)
<b>GERMANY:</b>	Deutsche Bahn AG; EVG (former TRANSNET/GDBA)
<b>ITALY:</b>	Ferrovie dello Stato (FS)
<b>LUXEMBOURG:</b>	FNCTTFEL
<b>THE NETHERLANDS:</b>	Nederlandse Spoorwegen (NS)
<b>POLAND:</b>	Polskie Koleje Państwowe CARGO SA (PKP Cargo)
<b>ROMANIA:</b>	Federatia Nationala “Drum de Fier”
<b>SWEDEN:</b>	Trafikverket, ASTOC/Almega

Other companies and institutions from Germany contributed with their projects and initiatives. These are:

- Hering Bau GmbH und Co. KG
- EVA Akademie, Quali X – Bildung und Zukunft eng verbunden
- Soziale Innovation GmbH

After the presentation of the practice examples, the explanation of instruments follows. These can help the responsible persons in the companies and unions to handle the promotion of employability. One of the instruments is the “demography-compass”. With this one the age structure of the workforce can be compiled and the need for action can be identified. To analyse one’s own employability, the “self-check employability 2.0” will be explained as a useful instrument. The “company check”, which supports the analysis of the company’s general conditions for employability, has a similar function.

If there are any examples in this guide, which inspire you to implement similar activities in your company, the initiators of the project would be glad to be informed of them. Further ideas and initiatives exist in other sectors. If there are projects and measures in your company, please feel free to send us information about them. Please contact the project organisation with further questions and suggestions:

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# GOOD PRACTICE EXAMPLES

RECRUITING AND RETENTION MEASURES

FURTHER EDUCATION AND TRAINING SCHEMES

HEALTH PROMOTION

WORKING CONDITIONS

# RECRUITMENT AND RETENTION MEASURES YOUNG PEOPLE ATTRACTING POLICY

## National Railway Infrastructure Company (NRIC) Bulgaria

### Benefit for the Company and the Employees

The company features the possibility of “refreshing” and reinforcing the staff, so as to avoid the “brain drain” and the future difficulties in finding specialized personnel.

The potential employees are given the chance to become well-acquainted with the company’s activities while gaining experience of the operating positions so as to choose the most appropriate one.

Besides gaining experience of railway-operating positions, students have the possibility to receive materials and help which are necessary for their graduation. Also they have the chance to receive a Qualification certificate required to perform their future obligations.

### Background and Initial Situation of the Initiative

For many years the Bulgarian railways have suffered from a lack of “Fresh blood”. The average age of NRIC staff is 45 years, the average length of service – over 25 years. In addition to that, the company faces the “Brain drain” problem due to many employees expected to retire. At the beginning of 2007 the NRIC HR department forecast difficulties in filling future vacancies for specialized engineering staff.

In trying to cope with the aging of its workforce and the future need for young and specialized employees, the HR department of NRIC has developed a Young people attracting Policy which consists of three Programs:

- Young specialists appointment Program – aiming to attract young graduate specialists
- Trainees Program – refers students from transport universities
- Scholarship Program – targeting last-year students from transport universities with min. grade “four”.

### Implementation in the Company

The implementation of the Young people attracting policy and its Programs started in 2008 with a campaign, giving wide and adequate information to the target groups. Announcements were published on the company’s website and placed on the universities’ info boards. In addition, the company presented its Young people attracting policy during the students’ meetings and joint activities. If some students are interested, they are free to fill in an application form. After the applicant has been approved by the HR department, he/she is invited for an interview with the HR Manager and the respective Head of department. In case of further approval, the procedure differs depending on the specific Program.

The most interesting part of the Young specialists appointment Program is that the young people have the opportunity to start working for the company immediately on a Temporary contract

basis, even if there is no vacancy. After a six-month period the employee’s performance is evaluated and if the result is “very good” or “excellent”, his or her labor contract is transformed into a permanent one.

Trainees Program refers students from transport universities who are interested in gaining some practical experience of railway operating positions during their summer vacation. For this purpose they are offered at least a one- to three-month Trainee contract. During the training period the students are thoroughly instructed and supervised by the most experienced workers. In addition, after taking certain theoretical and practical exams, they have the possibility to receive a Qualification certificate. The Scholarship Program is aimed at last-year students from transport universities with minimum grade “four” who are given a monthly scholarship of the amount of the minimum salary for the country along with the possibility to receive materials and technical assistance when necessary for their graduation. The holders of a scholarship are bound by a 3- to 5-year contract.

### Target Group and Participants

Young graduate specialists; students from the transport universities or last-year students from the transport universities with minimum grade “four”, interested in working for the company.

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# INTERNAL RECRUITMENT SYSTEM AT PKP CARGO SA

**PKP CARGO  
Poland**

## Benefit for the Company and the Employees

The internal recruitment system offers the employees an up-to-date overview of vacancies, for which they can apply. They have the chance to develop their career within the company. The company has the possibility to receive applications from staff who are familiar with its structure and processes.

## Background of the Initiative

PKP CARGO wanted to improve the recruitment of adequate and well-trained personnel. The company already employs a lot of well-qualified personnel. Some of them have already been working for the company for a very long time and therefore have a profound knowledge of its structure and processes and feel closely connected to it. If a replacement for a workplace is necessary, internal recruitment has priority over external recruitment to safeguard knowledge and retention. The “Internal Recruitment System” initiative is a joint employer and employee measure and needs input from both sides.

## Organisation and Monitoring in the Company

The internal recruitment system of PKP CARGO is based on an internal online database, in which vacancies are published and to which employees can apply.

The first step PKP CARGO took was to design the employer branding for the advertisements. The main values which the company wanted to communicate were fixed and the design of the advertisements was defined. The regulations of the recruitment process were discussed. The process structures the activities for the HR department, the hiring department and the activities the employee has to undertake, e.g. the information process, how to contact candidates, how to contact the hiring department, how to organize a recruitment process, how to apply, how to enroll on the internal job market, etc. Then an intranet-based recruitment tool was built, which had to be user-friendly and reliable for all involved parties. Public relations activities, e.g. mailing to employees, articles in the magazines and intranet, informed the employees about this new way to apply and how it works.

The recruitment process starts with the employer informing the HR department about vacancies. The HR department delivers the information about the vacancy using the intranet-based recruitment tool. The interested employee sends his application to the HR department. The application is put in an internal database of candidates. After a first selection, interviews are organized. The same process will be organized for the workplace, which will be vacant after a successful application by the employee.

## Target Group and Participants

The internal recruitment system is aimed at all employees of PKP CARGO.

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# SCHOOL COOPERATION AGREEMENTS AT DB AG

## Deutsche Bahn AG (DB) Germany

### Benefit for the Company and the Employees

A school cooperation is a win-win-situation for all involved parties: schools, young people as potential employees and DB as an employer: The school gets a better profile for vocational guidance and teachers get an insight into a big company and employer.

The young people get motivation through a strong link to real business life and direct support for their decision for the right occupation and/or study course.

DB can show its attractiveness as an employer and is given an opportunity to get to know potential applicants.

The closer cooperation between DB and schools is aimed at improving the transition from school to occupational life. The school cooperation agreements shall:

- Support occupational guidance at an early stage
  - Help find the right occupation (schools and pupils)
  - Enable teachers and pupils to gain practical experience with railway occupations
  - Explicitly support the transition to work practice
- Ensure early contact with and retain interesting candidates

### Implementation in the Company

DB and the schools sign a cooperation agreement which contains:

- objectives
- ways to cooperate
- length of the cooperation
- content (standard elements (such as apprenticeships, application training, information sessions) and additional optional elements (such as sitting in on classes for teachers, site-visits, inviting parents to an “open day”))

A “School Cooperation office” – based at DB Headquarters, HR department – coordinates all school cooperation agreements. The office is staffed with 3 persons (1 head, 2 employees, partly part-time).

By April 2010, 283 schools in Germany participated in the programme.

### Target Group and Participants

In principle, all types of secondary schools and their pupils, parents and teachers. Looking at Germany, the number of cooperation agreements differs in the different federal states (Bundesländer). Most school cooperation agreements have been established in Bavaria, North Rhine-Westphalia, Berlin and Hesse.

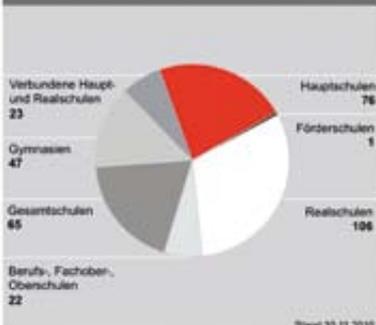
## School cooperations at a glance



340 participating schools throughout Germany



Share of participating types of schools



### Background and Initial Situation of the Initiative

DB needs to meet the demand for qualified staff in the long term. Demographic change urges DB to break new ground concerning the recruitment of young people.

On the one hand, DB is confronted with the general trend on the side of the possible applicants: a decreasing number of school-leavers, a big difference in performance quality between types of schools and regions, high requirements in terms of qualifications and job prospects, competition for well-qualified school-leavers.

On the other hand, DB needs staff with railway-specific knowledge which is not just available on the market, applicants for highly-skilled occupations as well as – in particular – engineers and economists with a university degree.

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# THE SUPPLY OF SKILLED LABOUR IN A CHANGING MARKET

**The Swedish Transport Administration,  
The Swedish Association of Train  
Operating Companies,  
Sweden**

## Added value for the railway sector

The end result of the project gives the following values to the railway market:

- Continuous supply of technical competency
- Competent co-workers
- Lower costs for the different companies
- Younger co-workers, a lower average age in the sector
- A better knowledge among young people of the railway sector and the opportunities to be educated and trained in the railway sector.

## Added value for young people

- New training opportunities in the technical field
- More opportunities to choose from
- A closer relationship with the railway sector
- Great opportunities to be employed immediately after finishing upper secondary education or higher-level training



## Background and Initial Situation of the Initiative

Already in 2007 an initiative was taken by several companies in the railway sector in order to make the sector better known in society and to develop an efficient educational system. The companies represented both the state-owned railway infrastructure manager and other parties, including technical consultants, companies from the entrepreneurial sector, train-operating companies and industry.

The reasons for the initiative were that the sector was relatively anonymous and that the demand for technical competency was going to increase at the same time as fewer young people

were educated and trained in the technical field. At the time economic activity was high and the competition for technical competency was fierce.

## Implementation in the Railway Sector

An organisation was formed with a steering group and a secretariat with representatives from the sector. Also a working group was formed within the Swedish Transport Administration. The task was to make the railway sector

1. better known among young people, 15–25 years of age, and to
2. bring railway technology education and training into the public educational system.

The work in making the sector more attractive has resulted in an Internet homepage for the whole sector targeting young people. There is information about the sector and a common billboard with job offers. In addition all available education and training opportunities are presented. Every participating company has a link on the website.

When the project started, there was in principle only one educational institution for education and training in railway technology (excluding the graduate level). The project has resulted in about ten upper secondary schools introducing railway technology programmes. In addition, five higher vocational training programmes have started. Within technical institutes and universities there is a three-year programme in railway technology engineering as well as a programme in electrical engineering specialising in railway technology. At the master of science level there is cooperation between several institutions. There are also plans for a Master's Programme in railway technology.

## Target Group and Participants

The target group is young people in the 15–25 years age group.

About 20 companies are participating in the project. Other parties involved are upper secondary schools, technical institutes and universities.

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# COLLECTIVE AGREEMENT: WORKPLAN ON EMPLOYMENT TRENDS

FS  
Italy

## Benefit for the Company and the Employees

The objective of this collective agreement is, to match job demands and workforce. Both management and employee representatives organise a joint monitoring of employment trends. With the support of a database, both parties foster a job matching and turnover management. In addition, vocational retraining or reskilling and employee redundancy management help to find new employment possibilities for those employees, who cannot work in their former jobs. This support helps to promote employability within the staff.

## Implementation in the Company

A database was set up to foster job matching and turnover management.

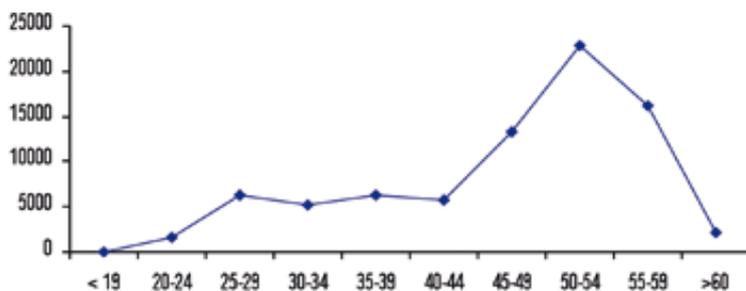
A specific fund for vocational retraining and employee redundancy management was set up. The fund offers two types of assistance:

- ordinary assistance, aimed at retraining/reskilling, which is financed by bilateral contributions from both the company and the employees;
- extraordinary assistance for employees, eligible for retirement benefits, who are made redundant. It is entirely financed by the company for a maximum duration of 48 months.

## Target Group and Participants

This collective agreement was concluded for the whole staff.

Employee Distribution by Age Group



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## Background and Initial Situation of the Initiative

The situation at FS is characterized by different elements. New technology has an impact on employment levels. New qualifications are needed for several job types. As the average age is very high, there is a need for a generational and professional turnover. In some sectors there is a surplus of employees. On that basis, the Social Partners (FS Group and Trade Unions) reached an agreement in 2009 envisaging a work plan up to 2011.



# WORKPLACE INNOVATION

## NS Nederlandse Spoorwegen Netherlands

### Benefit for the Company and the Employees

Within Nederlandse Spoorwegen there has been a project for 3 years, aimed at improving the relations between employer and employees.

The aim was to reach a situation of adult labour relations in which the employee takes responsibility for their employability and career, supported and facilitated by their employer.

The benefits for the employee are more job satisfaction, and more involvement in their work and career.

The benefits for the company are motivated employees and more commitment.

### Implementation in the Company

Over a three-year period there were a lot of (big and small) projects to achieve the desired result.

In the first two years the aim was to create awareness of the need for change, on both the managers' side and on the employees' side.

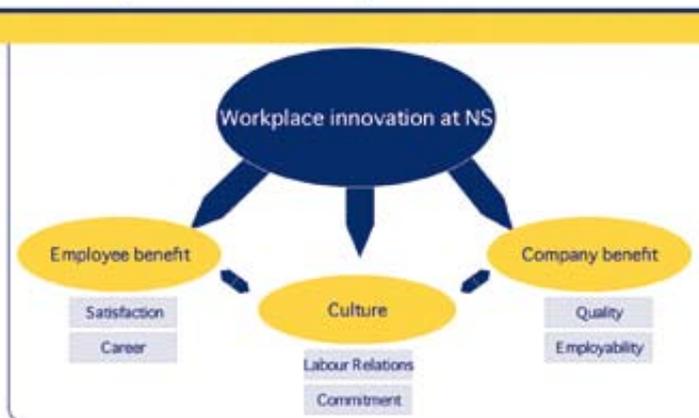
After this stage there were projects to create movement: talent classes, job rotation, creativeness courses, stimulating technological innovation.

Employees were oriented towards the necessity of development, even for jobs outside NS.

In the third stage of the project the ideas of workplace innovation were incorporated in the culture of the company.

## Workplace Innovation at NS

### Workplace Innovation, benefits



Investeren in Mensen



- Our approach:
- CAO 2007 - 2009
  - First stage: "Telling the story"
  - Second stage: "Creating movement"
- CAO 2009 - 2010
  - Third stage: "From project to mindset"



Investeren in Mensen



### Target Group and Participants

The target group for this project was all the employees, but especially the employees aged around 40 years who are at the end of their career but still have many years to go until retirement.

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# A COMPREHENSIVE PERSONNEL CONCEPT

## Hering Group Germany

### Benefit for the Company and the Employees

The various tools and actions of our personnel concept are above all intended to guarantee the happiness of our employees. Our employees are our most valuable asset, and we will only ensure our long-term survival on the market together with them. We are an innovative niche supplier and need excellently trained employees. Jobs in our company are demanding and require independence and, as a result, our employees can contribute their own input and continue their own development. In these efforts, they are supported by a comprehensive further education portfolio. This leads to close ties to the company, and this is very important for us in the context of our demographic development. It is also a way for us to maintain and enhance our own competitiveness and productivity and thus to safeguard jobs in the long run.

Another benefit of the various actions is to enhance the flexibility of our employees' deployment and consequently to maintain their employability as long as possible. Both parties will benefit from these actions – the employee does not have to be concerned about suffering social hardship in old age, and the company is able to retain the knowledge and the competencies of older employees as long as possible.

When our employees are happy and motivated when they go to work, it normally has a positive effect on their sickness rate.

For the company, there is another important aspect, i.e. to be perceived as an attractive employer by the labour market. The various tools assist us in these efforts. But the best spokespersons are again our own employees, when they enjoy working for the Hering company and also communicate this to the outside world by word of mouth.

### Background and Initial Situation of the Initiative

Initially, it is a matter of corporate culture how to deal with the company's employees. The Hering Group is a family-owned business in the fourth generation, in which care for the employees has always been "actively lived". The statement that our employees are "our company's biggest asset" is not mere lip service, instead it is filled with life by a wide range of actions. In this context, we consider mutual trust to be particularly important.

In recent years, demographic change has added another element, which we also feel in our company. In recent years, we have considerably stepped up our activities for the recruitment and development of young employees in order to find a sufficient number of trainees for our jobs in the building sector. And the issue of a "longer working life" also requires additional actions such as the recent introduction of lifetime hours accounts.

Since the needs and wishes of our employees have a major influence, we regularly collect them through employee surveys and appraisal interviews.

### Implementation in the Company

Introduction or implementation in the company is an ongoing process. The wide range of actions available to us today has been developed over many years and changes over time, as specific and different issues will become important at a given point in time and we have to react accordingly.

The responsibility lies with the corporate management in close cooperation with our HR management. Normally, the issues are developed in working groups consisting of employees from various units and functional groups in our company. A good cooperation with our employee representation body is also important in order to further enhance the acceptance of these actions among our workforce.

### Target Group and Participants

As a matter of principle, all groups of employees will be addressed from trainees to employees over 55 years of age. Naturally there are also some specific elements, which are targeted to specific groups of employees such as our 'TOP Training' for junior executives. Even our former staff (i.e. employees leaving the company to retire) will be a focus – they continue to receive our monthly company magazine and are invited to our annual pre-Christmas event.

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# OVERVIEW OF ACTION AT HERING GROUP

## Training or training marketing

- A total of 7 industrial/technical occupations, 2 commercial occupations and 2 dual-track higher education courses
- “Initiation day” for trainees at the beginning of their training
- Annual Girls’ Day
- regular classroom training in our works
- Supplementary seminars for trainees on various topics (e.g. learning techniques, conflicts, dos and don’ts)
- Company visits and actions for kindergarten children
- Cooperation with schools
- Contacts with various universities
- Different types of information material such as flyers, training videos
- Presence at vocational training exhibitions

## Further education and training

- Special “TOP Training” for junior executives
- Targeted education and training in line with our corporate strategy on the one hand and
- Our employees’ personal goals/wishes on the other (query in the annual appraisal interview)
- Seminars on cross-sectoral issues are organised as in-house events
- Targeted motivation of “older” employees to continue their further education/training (share of the ‘over 50s’ among seminar participants in 2009: 25%)



## Employee support

- Regular employee surveys
- “Partnership Model” since 1971 (employee profit-sharing, health bonus as well as non-material elements such as an employee suggestions scheme and a social fund)
- A wide variety of working-hour models for employees caring for small children or dependants
- Tele-working
- 2 employees are available as internal counsellors for family-related matters

- Cooperation with the Counselling Centre “Marriage, Family and Life Issues” (Beratungsstelle “Ehe, Familie und Lebensfragen”)
- Seminar programme for parents
- Promotion of parental leave for men
- Kids’ days during school holidays
- Holiday home in Spain (Costa Blanca)
- Lifetime working hour accounts



## Management of occupational health and safety

- Objective: learning health promotion
- In 2010/2011: training for approx. 60 managers on the subject “Healthy management” (“Gesundes Führen”)
- Wide range of sports events (e.g. football tournaments, beach volleyball, Nordic walking)
- Regular health days
- Participation in external events (e.g. AOK companies’ run, the “Ride your bike to work” action (Mit dem Rad zur Arbeit))
- Own health studio (T1) on the company premises
- Various vaccinations (influenza, meningitis)
- Workplace analyses with T1
- Officer for VDU workplaces
- No-smoking courses
- Relaxation courses (e.g. autogenic training, progressive muscular relaxation, power napping)
- Health bonus
- Coverage of various health issues in the company magazine
- Regular medical screenings
- Development of an occupational health and safety management (AMS Bau)

# STAFF RETENTION POLICY

## National Railway Infrastructure Company (NRIC) Bulgaria

### Benefit for the Company and the Employees

The Staff Retention Policy aims to give as much attention and care to the employees as possible in order to improve the quality of staff by developing well-trained, motivated and loyal employees, to lower the percentage of voluntary resignations and to fill the gap of unfilled operational positions.

### Background and Initial Situation of the Initiative

After the split of the Bulgarian State Railways National Company into two separate companies – Railway operator (BDZ) and Infrastructure company (NRIC) in January 2002, NRIC started to design a new methodological base along with an effective monitoring and flexible management policy aimed at adapting to changing conditions. Among the most important goals was to improve staff quality by developing well-trained and loyal employees.

In spite of the continuing trend that the majority of NRIC staff have worked at the company for more than 20 years, there is a shortage of personnel with the high-level education required for the implementation of specific activities in the company. Very often vacancies for some operational positions remain unfilled for more than three months. 42% of employee resignations are on a voluntary basis and only 5% of newly recruited employees are young people (up to 35 years of age).

### Implementation in the Company

The NRIC management decided that in addition to the Young people attracting Policy it is important to develop a Staff Retention Policy which is crucial for solving the problem of the shortage of qualified staff. Some of the actions in this area actually have a long history. The so-called Social Program is initiated by employees and implemented by the Company Collective Agreement when extra vacation days and payments, social funds, leisure activities etc. are negotiated. Step by step, starting from 2007, HR department implemented three new Programs: The **Evaluation program** is essential for the modern development of human resources. Staff evaluation is a standard procedure for each company and it is done once a year. What NRIC does especially to stimulate the employees whose performance is evaluated as “excellent” is to award them a bonus package. If a higher position is vacant, the award-winning employees are promoted. In addition, they receive a supplement to the monthly salary, extra annual leave, a one-off cash reward and the opportunity to enhance their qualification at the company’s expense. The **Financial Support program for improving education** is directed to the current NRIC employees who are studying for certain university degrees in the railway transport area. The offer is valid only for staff with a minimum three years of service in the company.

The applicant first goes through an evaluation procedure. In case of approval, financial assistance is granted for the worker’s semester fee. A binding 3- to 5-year contract is signed.

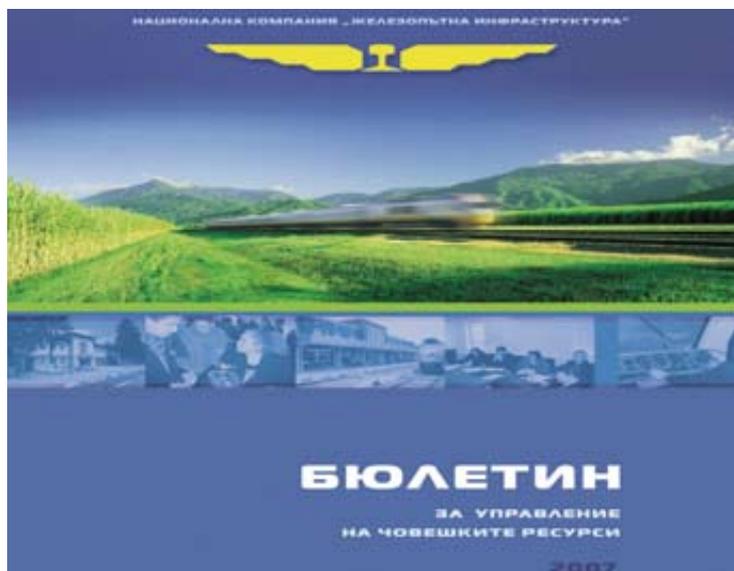
In recent years, the company underwent a restructuring process that is associated with shifting and releasing of workers. In its effort to retain as many workers as possible, NRIC gives the employees who are liable to be dismissed the opportunity for **Requalification**. For that purpose the HR department prepares a list of qualification courses according to the present or expected vacant positions. A worker liable to be dismissed can apply for a chosen qualification course according to the list. In case of approval by the General manager, a binding 3- to 5-year contract for the new position is signed.

### Target Group and Participants

The Evaluation and Social Programs are aimed at all employees of the National Railway Infrastructure Company (NRIC). The Financial Support Program is directed to the current employees who are studying for certain university degrees in the railway transport area. The Requalification Program is designed for the employees who are liable to be dismissed due to company restructuring.

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# FURTHER EDUCATION AND TRAINING SCHEMES

## COMPETENCE MATRIX

A company depends on the work and the qualification of its employees. The qualifications structure of a company will not be the same at all times, however. Technological innovations and new forms of work organisations require a continuous further education and qualification. At the same time, employees will again and again leave the company as a result of retirement or natural staff turnover. This wastage results in gaps in the qualification structure and thus has a negative impact on the company's productivity.

The SI-Competence Matrix was developed to counter such problems.

### IT Tool: SI-Competence Matrix

The SI-Competence Matrix can be used to determine

- the competences of each member of the workforce and
- his/her wishes and potential for further development.

In addition to the **individual** view, the results may also be shown **per unit/division** or for the **entire company**.

The tool permits an unrestricted definition of competences which may not be related to formal qualifications. Consequently, it is possible to map competences, for example, which are of particular importance for a specific company such as the operation of a certain machine.

The results are shown as a matrix formed by the individual members of the workforce in the company or unit/division on the one hand and their competences on the other. The level of proficiency for these competences is shown in the matrix in a colour code or in symbols. It is possible to define up to 4 competence levels.

### Determining qualification needs by a comparison of actual and target competences

TARGET values must be entered into the software for a comparison with existing competences. They are used to define the quantitative need for certain competences.

The difference between the existing competences and the TARGET values is shown automatically by the software in an up-to-date presentation of the current status. It also shows how many employees are interested or show the potential for a further qualification in this area. When a given competence is understaffed, the software provides an immediate analysis whether sufficient potential is available for development.

### Strategic planning – personnel development

Furthermore, the tool may also be used for a long-term perspective. This is done as follows: over a period between one and a maximum of 15 years, the software shows the loss of competence due to retirement. The users thus see the areas

Gegenwärtiger Stand		Anzahl	Interesse/ Potential	Anzahl	Interesse/ Potential	Anzahl
IST Stand	2010	5	0	10	0	3
Soll	2010	3		12		4
Abgleich		2		-2		-1
Zukünftiger Stand		Anzahl	Interesse/ Potential	Anzahl	Interesse/ Potential	Anzahl
IST Stand	2015	5	0	8	0	3
Soll	2015	8		8		2
Abgleich		-3		0		1

and the type of competences, in and for which the company needs to act. It is also possible to estimate whether these gaps could be closed by the existing and available potential. This is interesting especially against the background of an increasing shortage of skilled personnel: the development of in-company resources will help to avoid time-consuming and often unproductive search processes. The necessary recruitment of new employees will then possibly focus on jobs and competences, which are easier to find on the external market.

It is also possible to estimate the need for required future competences, which can also be shown in the matrix:

- Will competences no longer be needed in future or will they be needed to a lesser extent?
- Will the need for certain competences increase or will new competences be added which are presently not available at all?

This is important information for personnel recruitment and personnel development and this information will trigger and enable a targeted and systematic approach.

But a lot of care must be taken in designing and structuring the company-related matrix, as the quality of results will largely depend on the amount of "thought" given to the structure. It starts with the determination of the competences, which are and will be required today and in future, and it continues in the definition of the required "TARGET figure" for these competences.

The SI-Competence Matrix provides an easy-to-use and readily adjustable basis for this effort.

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# CONSULTATION ON FURTHER TRAINING: QUALI X – BILDUNG UND ZUKUNFT ENG VERBUNDEN

Initiated by EVG (former TRANSNET/GDBA) and Arbeitgeberverband der Mobilitäts- und Verkehrsdienstleister e.V.

Funded by Fonds zur sozialen Sicherung für Arbeitnehmer der Mobilitäts- und Verkehrsdienstleister e.V.

Organised by EVA European Academy for Environmentally Friendly Transport.  
Germany

## Benefit for the Company and the Employees

The objectives are to give persons a future in the company and to enhance their employability. Well-qualified and motivated personnel is a benefit for the company. Vacancies can be re-filled with internal staff. The employees have the chance to develop themselves and their career. This promotes their social security in the future.

## Background of the Initiative

TRANSNET/GDBA and AgvMoVe intended to promote employability of its staff by supporting training and further education. Economic and technical developments in the railway sector are changing requirements for employees and personnel structures of the companies. In many German companies the average age of the staff is increasing and difficulties are arising in recruiting junior employees. To improve the opportunities on the job market and to keep employees in the company, the employees need career prospects. They wish to develop their vocational opportunities, but in many cases the possibilities for development in the company are not known. Therefore the employees do not assess their career prospects very positively. This project was initiated to inform the personnel about vocational possibilities and to achieve a higher participation by employees in training schemes. The project started in 2009.

## Organisation and Monitoring in the Company

The Social Security fund established the programme “Quali X – Bildung und Zukunft eng verbunden” to inform employees about career prospects in the transport sector and about offers of further education and training. Seven advisors were chosen, who have a knowledge of the structure of the company Deutsche Bahn AG. They are experts in development possibilities and training offers, not only in the transport sector but also at an individual level. These persons have their offices in seven regions of Germany, so as to guarantee a personal consultation. The consultation process comprises, after the first contact, the preparatory phase, the consultation itself and monitoring during the decision-making process and the training period. The support for the employees’ decision-making process takes the personal situation and life-phase into account, as well as the strengths, aims and visions of the employee.

Public relations activities as presentations, publications and workshops communicate the project offering to the employees, the employee representatives and the human resources managers. With increasing publicity, the number of requests for consultation on vocational training has risen from month to month.

## Target Group and Participants

The offer is aimed at all employees for whom the long-term account collective agreement is valid and who are members of the trade union EVG. The advisers were chosen by the Social Security fund and EVA. Multipliers are employees, employee representatives and human resources managers.



**Quali X –**  
Bildung und Zukunft eng verbunden

- Wer sind wir?**  
„Quali X – Bildung und Zukunft eng verbunden“ ist eine individuelle berufliche Bildungsberatung für junge Beschäftigte der Mobilitäts- und Verkehrsdienstleister in dem Bereich der beruflichen Weiterbildung und Qualifizierung.
- Was ist unser Ziel?**  
Weiterbildung ist ein wichtiger Schlüssel zur Gestaltung der eigenen Zukunft. Wir werden mögliche berufliche Perspektiven durch Weiterbildung aufzeigen.
- Wie machen wir das?**  
Durch individuelle Beratungen informieren wir über berufliche Bildungs- und Fördermöglichkeiten und unterstützen den Bildungsweg.

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# TRAIN@RAIL

## NMBS/SNCB Belgium

### Benefit for the Company and the Employees

Ensuring and guaranteeing high-quality training

### Background and Initial Situation of the Initiative

- HR regulations and also guaranteed by the “Personnel Statute” (Statut du personnel)
- Social agreements with recognised organisations

### Implementation in the Company

Fields of activity

Ensuring and guaranteeing high-quality training

#### • Improvement

- Language training (train drivers, train crew, ...) (Furthermore, employees wishing to improve their knowledge of a second national language will be offered a possibility to follow – with sponsorship by Train@Rail – a voluntary specialised course, which is offered outside of working hours – protocol of the social agreement for 2008–2010.)
- office software training (working with a computer)
- tailor-made training and specific courses (coaching, ...)
- selection tests (promotion tests, ...)

#### • Management & Leadership

- tailor-made training courses focussing on the behavioural competences of managers and experts

#### • Vocational training

- **The National Training Council (Conseil National de la Formation, CNF)** is a bilateral forum of the two sides of industry which examines major training courses. The management of the three companies in the SNCB Group are represented as well as the recognised employee organisations.

CNF proposes a discussion platform where the SNCB Group describes its objectives in the training field while taking the employees’ interests into account.

CNF ensures the administrative support, contacts with the agencies concerned, the dissemination of the necessary information such as curricula and training indices, and it organises the consultations between the two sides of industry.

### Target Group and Participants

- An education plan for each occupation
- For each new occupation, bilateral negotiations with a view to an education plan
- In case of an adaptation of occupational characteristics, adjustment of the education plan through bilateral negotiations



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# COLLECTIVE AGREEMENT ON QUALIFICATION

FS  
Italy

## Benefit for the Company and the Employees

In 2006, the FS Group reached an agreement with the trade unions on apprenticeship. The aim of the agreement is to qualify young people aged between 18 and 29, through theoretical and practical training courses, with the objective of improving their qualifications and providing them with technical and vocational skills. An important aspect is to promote the integration of theoretical and practical training to ensure a high quality standard of training.

## Background and Initial Situation of the Initiative

The aim of the collective agreement, signed by the FS Group and the Trade Unions in 2006, is to qualify young people, through theoretical and practical training courses, and favour their access to the world of work.

## Implementation in the Company

On the basis of the Agreement, the apprenticeship contract involves most vocational profiles, with the exclusion of the highest and lowest ones.

The apprenticeship lasts from a minimum of 29 months to a maximum of 46 months.

For an 18 month period, workers hired on an apprenticeship contract receive an “entry wage” lower than the salary for the grade to which they are assigned.

At the end of the apprenticeship period, workers must pass an aptitude test.

Training consists of on-the-job and off-the-job training courses. Theoretical training, which comprises the basics of occupational safety, may not last less than an average of 150 hours per year (training hours are paid). Each vocational profile has its own training pathway.

Practical training is provided under the supervision of a company tutor, who is a qualified worker appointed by the undertaking entrusted with the task of supporting the apprentice throughout the apprenticeship period. Each tutor supervises a maximum of five apprentices.

20% of the apprenticeship activity consists of training and the remainder of work activity.

To perform the work activity, apprentices must obtain certifications required for the specific vocational profiles.

Nowadays for most vocational profiles, apprenticeship represents the normal entry route.



## Target Group and Participants

Young people aged between 18 and 29.

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# TRAINING OF EMPLOYEES ON THE FIRST QUALIFICATION LEVELS

**SNCF**  
France

## Benefit for the Company and the Employees

1- Developing the employability of employees and especially the weakest employees by promoting the development of their competences and by including them in the logic for career development and planning.

2- Enabling the employees to follow vocational or promotion-oriented training, for which they currently do not meet the requirements or when they lack the necessary confidence in their own learning abilities by preparing the employees for such a broadening of their competences.

## Background and Initial Situation of the Initiative

In the context of a longer working life, the development of occupations towards greater technical competences and the retraining of employees for service occupations and equipment requiring a higher level of professional competency, the least qualified groups seem to be the most vulnerable in terms of sustained adaptability.

But the development of competences is indispensable for consolidating a professional career, enabling promotions and allowing a development towards other occupations especially for those working in difficult conditions.

This is the reason why one of the priority areas of the training agreement speaks of “promoting the development of competences among employees on the first qualification levels” and of “integrating them into the professional development logic of the project”.

## Implementation in the Company

A new training system for employees on the first qualification levels was introduced in April 2010 to give more consideration to the occupational dimensions in the sectors and to better target the priority groups.

### It consists of refresher training in the following areas:

- Training with a view to enhancing the participants' learning capacity (learning to learn)
- French
- Mathematics
- Introductory IT training
- Introductory office software training (Word, Excel, Powerpoint)
- Principles of electricity
- Principles of mechanics

Managers are at the core of the system: among the members of their teams, they identify the employees who are set to benefit from this training, and with support from the training coordinator, the managers help them to determine their needs and formalise their training schedule.

The length of training is determined individually for each employee and depends on the competences to be acquired. The level of training is adapted to the individual needs of the employee and permits us to keep track of the employees with the greatest difficulties.

The employees attend the training on a voluntary basis. The training sessions are held during regular working hours.

## Target Group and Participants

Employees on the first qualification levels who respond to the criteria established by the various units (examples: employees without certificates, employees at risk due to the evolution of their occupation: vulnerable jobs or occupations with difficult conditions)

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DIRECTION  
DES RESSOURCES HUMAINES



# SUPPORT SYSTEM FOR THE SECOND CAREER HALF

**SNCF**  
France

## Benefit for the Company and the Employees

Every employee will have an opportunity to establish a career plan for himself/herself in the company and to develop his/her employability throughout his/her working life and especially during the second part of his/her career.

Employees are offered an opportunity to re-examine their prospects for their working life after approximately 15 years of experience and to capitalise on and develop their competences in order to establish themselves in a motivating and long-term occupation.

For the company, there is an evident benefit in maintaining the employees' motivation and their competences throughout their working lives, and it also benefits from anticipating the necessary evolution of employee competences.

## Background and Initial Situation of the Initiative

A new demographic order with a demographic replacement, which has been largely completed (60,000 young people have been recruited into SNCF since 1997) and the increasing number of older employees in the company (as a consequence of the extension of working life beyond 55 years of age after the pension reforms initiated in 2008) are the challenges for the company with a view to balanced management of all age groups.

A system which is integrated into the Training Agreement (Accord Formation) 2008–2011 whose proclaimed objective is to allow every employees to set up his/her career plan within the company and to develop his/her employability throughout his/her working life and especially during the second part of his/her career, as well as the Older Employee Action Plan (Plan d'Actions Seniors) 2010–2011, whose aim is active management of all age groups especially by actions in favour of older employees.

## Implementation in the Company

A two-tier system to support employees in the second part of their working lives, when they define and realise their career plan, which is recognized by the company:

### First tier:

1- After 15 years of career, any employee requesting it may benefit from an **In-Depth Career Interview (Entretien Approfondi de Carrière, EAC)** with a career counsellor or a mobility counsellor. This interview permits the employee to take stock of his/her situation (career path, activities performed, competences acquired, training courses attended) and of his/her ambitions and constraints. With the support of the career or mobility counsellor, the employee then defines his/her career plan and the directions to be taken to realise this plan. The EAC

may lead to a confirmation of the employee's current orientation, a mobility plan, career development, a training plan or a **Professional Assessment in Mid-Career (Bilan à Mi-Parcours Professionnel, BAMP)**

2- All employees who have gone through an EAC and wish to go further, may also get a **BAMP**: this is personalised support provided by an external service provider to establish the employee's career plan for the second half of the employee's working life. This assessment takes 20 hours and several meetings over a period of 2 to 3 months.

### Second tier:

3- For employees above 45 years of age (or with 20 years of experience), who have set up a recognized career plan following an EAC and a BAMP, the number of training hours credited under the DIF system (Droit Individuel à la Formation, EN: individual training entitlement) is increased in advance to 300 hours (as against 120 hours in the general regulation).



## Target Group and Participants

Employees in the second half of their working life with at least 15 years of job experience irrespective of their professional status (operative, supervisor or manager).

And for the third action, the extended training entitlement, employees must be 45 years and older, or they must have acquired at least 20 years of job experience.

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# SAFEGUARDING RELEVANT KNOWLEDGE BY SYSTEMATIC “KNOW-HOW TRANSFER”

**Deutsche Bahn AG**  
Germany

## Benefit for the Company and the Employees

The objective of know-how transfer is to safeguard relevant expert knowledge which is crucial for the performance of the department/subsidiary/company, supported by an efficient process.

### A systematic Know-how transfer leads to:

- Quality increase: defined processes for the documentation of knowledge
- Increased efficiency: faster access to information, easier distribution of documents, facilitated cooperation
- Cost savings: less time for searching, correction of mistakes

## Background and Initial Situation of the Initiative

- The resource “knowledge” is becoming more relevant for competitiveness, in particular in the face of demographic change and its implications within the company
- A large number of employees – in particular in technical occupations – will be retiring in the coming years
- Important expertise will be lost
- Challenge: To safeguard this knowledge by systematic know-how transfer
- Central question: Which knowledge is crucial and which experience will be lost because of the age structure and other staff turnover?
- Crucial knowledge = knowledge which is essential for the performance of the company, which is only available in small groups of employees or even attached to single persons and is not easily replicable or available on the market (time, costs).

## Implementation in the Company

The project was embedded in the HR Initiative “Experience DB” and organized by DB Training, an incorporated company of Deutsche Bahn AG.

Regarding the sub-activity “Managing know-how transfer”, the following process steps have been established.

1. Know-how analysis
2. Staff turnover analysis
3. Analysis of the need for action
4. Identification of the recipients of know-how
5. Implementation / selection of the instruments (face-to-face, in groups or by means of documents)
6. Evaluation (back to 1.)

The project drafted a guideline “Know-how transfer” directed to managers. The major element is a toolbox with instruments (for step 5). The criteria for the selection of instruments are:

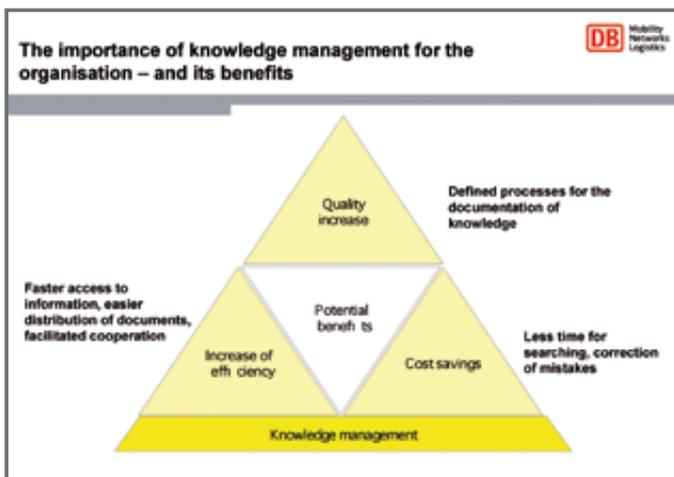
- Effects of the know-how transfer
- Costs
- Time
- Necessary time for preparation
- Size of the target group.

The different instruments are described in the guideline by following a common scheme: short description, types of this instrument, supporting measures, benefit, preconditions, limits and costs.

## Target Group and Participants

Managerial staff of all departments with crucial knowledge, combined with a crucial demographic situation in the team/department/subsidiary.

Initially, a pilot project was selected. The selection and evaluation of the instruments are the responsibility of the line manager.



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# KNOW-HOW-TRANSFER

## What for?

The “Knowledge transfer in tandem” tool is suitable for the qualification and initiation training of new as well as experienced employees. It concerns training measures “below” a vocational training certificate. It must be regarded as one building block for corporate career planning. Its objectives are to secure the empirical knowledge of older employees by a systematic job-related knowledge transfer to younger colleagues and to enhance the flexibility in deploying both younger and older employees. When it concerns the transfer of empirical knowledge in particular, job-related forms of learning have proven to be more suitable than theoretically oriented further education.

## How, where and who?

**Place(s) of learning:** the company

**Trainers:** experienced employees with a high level of empirical know-ledge

**Learners:** basically every employee

The former “job owners” provide practical on-the-job training and orientation training to their colleagues. The former “job owners” are the experts. They have all the know-how, the empirical and practical knowledge needed to successfully do the job.

## Competence mapping and determination of qualification needs

The prerequisites for systematic qualification

- identification of knowledge owners
- determination of persons to be trained

Only when it is clear which employees are able to successfully perform the duties of a job and how many employees are required to perform the duties associated with specific jobs, an appropriate qualification plan can be drawn up which will provide the basis for the knowledge tandems.

## Preparation

### Joint compilation of workbooks as training material

Who shall explain the material? The experienced “job owner”. Can he/she do it “from the top of his/her head”? Some could do it “from the top of their head”, but others are less able to do that. The tutors there-fore how to design their own qualification concept – or a guideline giving them orientation during the qualification measure. In order to develop a meaningful guideline, they have to put themselves in the position of the newcomer. The task of systematically explaining one’s own job to a newcomer results in the experienced experts regarding their own job from a totally different perspective. In a sense, tutors will again become learners at their own workplace. As a result of these preparations, a “**knowledge transfer in tandem**” **workbook** is drawn up for each job. This workbook is used as training material during the job-related qualification.

## Methodological workshop

In addition, the tutors receive training on important constraints and rules as well as the methods and tricks for such a “knowledge transfer in tandem” during a methodological workshop.

## Non-job related qualification

A total command of the job will ultimately be possible only when the person working there can properly position his/her job in the overall corporate structure in terms of his/her specific duties in a process, the interaction of processes and the specificities of his/her job or his/her activities. It is almost impossible to acquire this knowledge only through on-the-job training. This is also true for the basic knowledge about the significance of a particular workplace from an economic and quality-related perspective. Consequently, company-level seminars on non-job-related issues support the knowledge-transfer effort.



## Qualification on the job: Tandem phase

In this step, it is necessary to set up the knowledge tandems and to schedule the appropriate training times to implement the qualification. A regular common reflection on the learning progress helps to plan the next steps. If necessary, a training schedule with content and time-related milestones may be drawn up for this purpose.

In the retail, logistics and metalworking sectors, this concept has been used in several hundred cases.

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# HEALTH PROMOTION RISK ANALYSIS

**NMBS/SNCB  
Belgium**

## **Benefit for the Company and the Employees**

### **Which conclusions may be drawn from a risk analysis?**

A risk analysis permits the following identifications:

- What are the risks?
- Who is potentially in danger as a result of these risks?
- What are the priorities?
- Is the risk sufficiently contained?
- From a negative perspective: What are the possibilities for reducing this risk?
- Is it necessary to take action to improve the protection of employees?

## **Background and Initial Situation of the Initiative**

Council Directive 89/391/EEC of 12 June 1989 on the introduction of measures to encourage improvements in the safety and health of workers at work

Article 5

General provision

1. The employer shall have a duty to ensure the safety and health of workers in every aspect related to the work.

As stated in the Law of 4 August 1996 on the well-being of employees (Belgium), the well-being of employees shall be promoted in eight areas.

These areas are:

- Safety at the workplace
- Protection of the employee's health
- Work-induced psychosocial stresses
- Ergonomics
- Occupational hygiene
- Improvements at the workplace
- Environment
- Bullying and sexual harassment at the workplace

## **Implementation in the Company**

### **What is a risk analysis?**

A risk analysis is a systematic study of:

- The dangers which potentially cause injuries or damage
- The opportunities to eliminate these dangers
- The ways to eliminate them
- The actions which may or must be taken to avoid a situation in which the danger causes damage or injuries.

### **How often should a risk analysis be performed?**

- Every five years. The risk analysis must be repeated in all instances, where the situation at the workplace changes and may lead to potential changes of these risks. A risk analysis may especially be demanded in all instances, when new duties are given to an employee or when new activities are created. The analysis must be carried out for all workplaces.

### **What does the obligation to prevent risks mean for the employer?**

The employer must take the necessary actions to protect the employees' safety and health.

The employer must therefore guarantee:

- The prevention of occupational risks
- The dissemination of information as well as training

The organisation and procurement of the necessary material

## **Target Group and Participants**

### **What are the target areas of prevention?**

- The organisation of the company as well as the working methods and the methods of production
- The design, management and adaptation of workplaces
- The selection and use of tools and equipment,...
- The psychosocial burden (stress) caused by the activity
- The competence, training and information of all employees
- Emergency procedures.



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# RISK ANALYSIS

**Société Nationale des Chemins  
de Fer Luxembourgeois  
Luxembourg**

## Benefit for the Company and the Employees

**Findings and conclusions drawn by external consultants:**

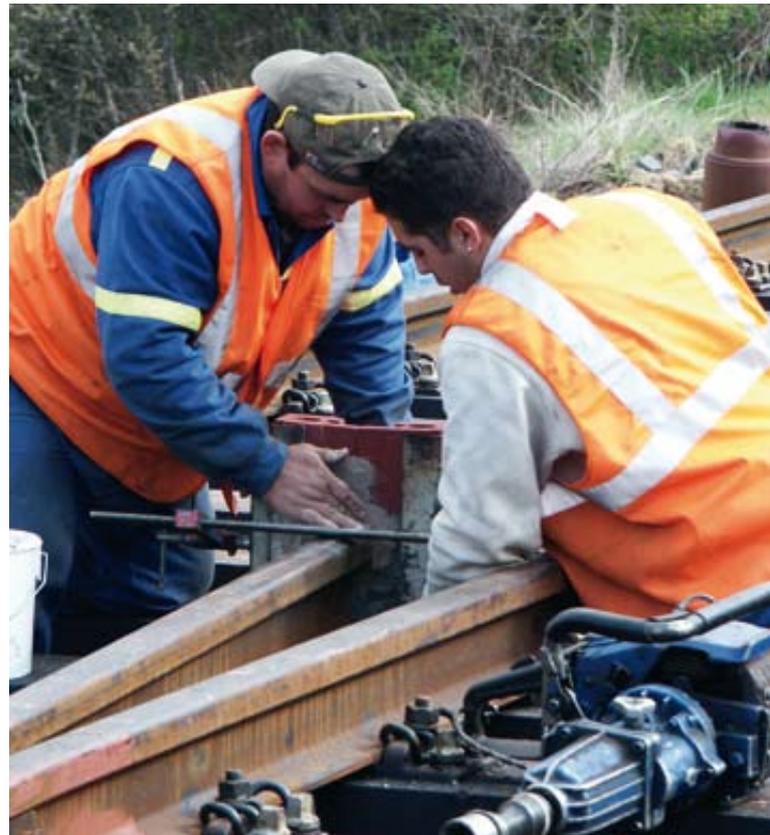
- Developing assistance regarding human and organisational factors affecting the personnel
- Defining an action plan and modalities for its implementation
- Precisely matching identified actions / solutions
- Future training: changes
- Improving the methods used for the selection of candidates
- Improving the presentation of the occupations
- Rotation of interviewers
- Optimising the coordination between trainers and internship managers
- Enhancing the image of the occupations
- Redefining communication campaigns
- Continuously monitoring the headcount of operating personnel
- More targeted, coordinated and organised recruitment
- Increasing the training and managerial capacity
- Exchanging opinions with the employees concerned

## Background and Initial Situation of the Initiative

Shortage of personnel in certain branches

## Implementation in the Company

- 2009



## Target Group and Participants

Occupations concerned:

- Train drivers
- Security personnel
- Train crew
- Personnel working non-regular service hours

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# A HEALTHY COMPANY – HOW TO OVERCOME WORK-RELATED STRESS – PKP CARGO SA

**PKP CARGO  
Poland**

## Benefit for the Company and the Employees

The project “A Healthy Company – How to Overcome Work-Related Stress” is advantageous for both employees and employers alike.

The approach introduced in the project contributes to the improvement of employees’ health by decreasing the level of work-related stress. The improvement of the employees’ psycho-physical condition is attained through the perfection of the working environment. The elimination of psycho-social factors creating stress in the working environment, or keeping these at a minimum, influences the degree to which employees are satisfied with their work and contributes to increasing their motivation. Decreasing work-related stress also has a positive influence on the quality of one’s private life.

The enhancement of productiveness at work is advantageous for PKP CARGO SA, as are lower working expenses due to absence, passive presence, occupational illnesses and accidents on the job. The result of the project is the perfection of the organisational culture of the company, procedures, system of motivation and the way people communicate. These elements have a positive influence by creating friendlier working conditions, leading to reduced stress.

The cooperation of representatives of the board of directors of PKP CARGO SA on the project, as well as labour union representatives and many employees, contributes to the creation of a style of partnership in the management of the company.

## Background and Initial Situation of the Initiative

PKP CARGO SA is changing into an independent logistics operation. The restructuring accompanying these changes influenced the change in the organisational structure and the change in the number of duties and working environment of many employees.

For years, the board of directors of PKP CARGO SA has been implementing measures for the furtherance of employees’ health. These include additional days off, providing regenerative meals and financial support of recreation for employees and their families.

The project “A Healthy Company” shows a new approach to employees’ health by identifying factors contributing to stress, with the aim of changing the working environment and decreasing stress on the job.

## Implementation in the Company

The first step undertaken when the project was started was to find a professional partner with experience of optimizing the working environment and of keeping work-related stress at a minimum. It was decided to cooperate with the Institute for

Occupational Medicine (Instytut Medycyny Pracy), which has many years of experience of conducting projects connected with work-related stress.

The project began with the selection of a test group consisting of 11 professional groups and over 2000 employees. The second stage was concerned with distributing the information on the project among the employees and directors. One of the most important stages in this project was the investigation of factors causing psycho-social stress. It was carried out by having over 2000 questionnaires filled in by employees and by conducting an employees’ survey on the job.

The result of the investigations was the creation of an extensive study on the concept of “Factors Creating Psycho-Social Stress at PKP CARGO SA” containing information on the most important causes of work-related stress and pointing out the main risk groups. The experts from the Institute for Occupational Medicine (Instytut Medycyny Pracy) introduced the results of the investigation to the board of directors of PKP CARGO SA, the labour union representatives and also to the directors of the Bureau for the Administration of Human Resources (Biuro Zarządzania Zasobami Ludzkimi).

The next stage of the project is the meeting of experts from the Institute for Occupational Medicine (Instytut Medycyny Pracy) with representatives of individual professional groups in order to create preventive programmes for the restructuring of the working environment by, for example, changing procedures, changing the way people communicate with each other and by introducing training programmes in the area of better stress management at work.

The last stage is the introduction of measures for lowering the level of work-related stress in the individual organisational units and the evaluation of the project.

## Target Group and Participants

The project is aimed at all employees of PKP CARGO. The first measures undertaken for the reduction of the level of work-related stress will be orientated towards professional groups who are most endangered by work-related stress.

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# LACK OF APTITUDE FOR A PROFESSION

## Société Nationale des Chemins de Fer Luxembourgeois Luxembourg

### Benefit for the Company and the Employees

#### Actions to be taken for employees with a lack of aptitude affecting their working life

- Except for employees whose restrictions are attributable to an industrial accident, the situation of employees with a lack of aptitude occurring during their working lives shall be regulated as follows:

#### Employees with a lack of aptitude and who can normally carry out other activities:

- The HR service consults the occupational health physician of the network and then proposes a workplace where the activities do not clash with the nature or the cause of the restriction.
- After a period of six months, the employee is considered as the permanent holder of the new position.
- When the employee becomes unfit after having passed a promotion test, the employee will retain his/her right to this promotion, which will be granted when his/her service grade permits this promotion.
- When the employee having the restriction has to be transferred to a different career, he/she will only acquire a right to promotion in this career when the person concerned fulfils the conditions associated with this promotion.
- When the new employment is of a higher grade than the old one, the employee shall only be given a more favourable remuneration after he/she has fulfilled the general conditions for promotion to this grade.
- At any rate, the employee may not claim the benefits pursuant to the Personnel Statute on Compensation which are granted to employees carrying out activities which are superior to the activities of their grade.
- When the restriction is attributable to a reason which the employee could have avoided (such as alcoholism, tobacco smoking, brawl, off-time accident), the relegation to an inferior grade is associated with a biennial suspension of a promotion back to his/her previous grade.
- The employee will retain the remuneration associated with this grade until his/her new position gives him/her an advantage compared to the previous one.

#### Employees with restrictions for any kind of regular employment:

- Continued employment in this category of unfitness cannot be justified, a discharge is therefore initiated when the conditions pursuant to the Personnel Statute and the Pension Regulations are fulfilled.

### Background and Initial Situation of the Initiative

#### Specific assessment studies

- Maintaining and developing the competences of employees is a major challenge in the areas of safety, quality of service and protection.
- The identification of an employee's occupational difficulties by managers leads to an assessment study, which is triggered by the first warning signals.
- These specific assessment studies are an element of the system of competence monitoring.
- They allow managers to get:
  - an update of the potential and the competences of the employees they manage;
  - an evaluation of the risks associated with keeping an employee in a position;
  - recommendations regarding the most appropriate solutions for a given situation;
- They offer employees an opportunity to find solutions to the difficulties they are confronted with.

### Implementation in the Company

- 1986: recast of General Regulation No.3 (Ordre Général N°3) on the recruitment and promotion of permanent CFL employees.
- 1995: establishment of the Psychological Service

### Target Group and Participants

Occupations with a tendency to generate employees who are unfit to normally perform the activities of their regular employment:

- train drivers
- security personnel
- personnel working under difficult conditions in the immediate track area
- train crew
- personnel working non-regular service hours

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# GENERAL REGULATIONS FOR THE READAPTION, RETRAINING AND RECLASSIFICATION OF MEDICALLY UNFIT EMPLOYEES

NMBS/SNCB  
Belgium

## Benefit for the Company and the Employees

Retraining of employees who are unfit to perform their normal duties

## Background and Initial Situation of the Initiative

- Regulations for the entire workforce as guaranteed by the “Staff Regulations” (Statut du Personnel)
- 1.25% of all positions in the Holding company, in NMBS and Infrabel have been set aside
- The employee may refuse the reclassification = retirement for medical reasons

## Two basic principles

- **complete unfitness**
- **partial unfitness**
  - Partially unfit for his/her duties
  - Definitely unfit for his/her duties
  - Definitely unfit for any type of duty (retirement)
  - Training at the new workplace

## Implementation in the Company

- As laid down in the regulations, which already apply to all personnel and are guaranteed by the Staff Regulations

New initiative: still needs to be finalised: **Protocol to the social agreement 2008–2010**

## Retraining of personnel in case of unfitness for normal duties

A certain number of rules have been drafted bilaterally to:

- Facilitate compliance with the rate of 1.25% of all jobs as part of the number reserved for employees who have been declared medically unfit for their normal duties;
- Adopt a uniform and optimised reclassification policy;
- Carry out a study in view of options for returning medically unfit employees to work for duties which are as close as possible to their original ones and follow their own orientation in order to avoid any retraining, which is not desired by employees having acquired **a lot of railway expertise**;
- Establish an option to create positions which are specifically reserved for employees in the above-mentioned situation so that they can provide some sort of **mentoring by coaching and supporting their colleagues newly entering this occupation**;
- Provide a formula which will allow the official introduction of a scheme involving “part-time work for medical reasons”. In certain circumstances, this scheme should allow a better readaptation of an employee to his/her working life.

## Target Group and Participants

- Regulations for all employees

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# DB HEALTH WORLD

**Deutsche Bahn AG**  
Germany

## Benefit for the Company and the Employees

With DB Health World, we offer a comprehensive portfolio of health-related actions to our employees and their superiors. Without appropriate countermeasures, the sickness rate in the company will continue to rise, and due to the associated reduced productivity it will affect the company's competitiveness and thus its employment opportunities.

For the employees, health-related measures provide support for their own efforts to maintain their employability. They support the employees' own initiative by generating the necessary knowledge, presenting a positive setting for further activities and by systematically implementing health-related measures in HR processes.

## Implementation in the Company

In a strategic HR initiative on demographic change, DB Health World was jointly developed by senior executives and specialists. Consequently, the issue enjoyed a high level of management attention right from the start. Existing and proven actions were systematically linked to new ideas.

Health interviews with employees, training for executives and incentives for the personal health promotion of executives were systematically linked.

Problems for the national and sustainable implementation of the initiative initially emerged as a result of the severe economic crisis in 2009 and the associated cost-cutting requirements, which demanded stretched-out actions and timelines. And many actions show that health and personal responsibility are "difficult to sell", and that major efforts are needed to motivate the staff for such a project.

## Background and Initial Situation of the Initiative

As a transport company with many activities, which are particularly challenging to the human body and mind, Deutsche Bahn AG is particularly affected by demographic change. The average age of its employees is increasing, and in a few years it will amount to almost 50 years. Both employees and the company must jointly make every effort so that as many employees as possible will remain employable until they reach the statutory retirement age. Based on the European employability initiative of the social partners in the railway sector, a comprehensive strategic initiative was launched to look for new ways in health management.

## Target Group and Participants

Executives with human resource responsibilities;  
Managers with on-site operating responsibility;  
Staff in operations and key positions.

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# PHYSICAL FITNESS AT WORK IN THE RAILWAY INTEROPERABILITY FRAMEWORK

## The promoter of the project is RFI S.p.A. (FS Group) Italy

The project is of European relevance and its development concerns the European railway undertakings and infrastructure companies.

### Benefit for the Company and the Employees

The main purpose of the project is to define the common guidelines regarding the medical examinations related to the age for drivers operating locomotives and trains on the railway system in the European Community.

In particular, the project activities aim to draft common guidelines for European-accredited medical units containing:

1. Medical protocols regarding more common age-related pathologies (such as cardiac pathologies, eyesight diseases, etc.);
2. Common criteria for evaluation of specific age-related cases;
3. Acceptability of specific medical devices (such as ICD, pacemaker, intraocular lenses for the cataract operation, etc.).

All the railway systems in the European Community will benefit from a common evaluation of physical fitness in relation with age-related aspects. Common guidelines can promote an increase in the safety levels by examining the human factors.

### Background and Initial Situation of the Initiative

The legal framework of the project is constituted by the medical requirements contained in ANNEX II of the Directive for drivers operating locomotives and trains on the railway system in the European Community.

Annex II of the Directive 2007/59/EC does not contain:

- 1) Age limits for drivers
- 2) Different requirements in relation to age
- 3) Specification of the medical protocols on the basis of age.

### Implementation in the Company

At the moment the project has not yet started at the European level.

At company level the medical protocols adopted contain special measures for common age-related pathologies.

### Target Group and Participants

The working group with the task of following up and implementing the project will be composed of the railway medical doctors employed in the medical services working for/inside the most important railway undertakings and infrastructure companies in Europe.

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# WORKPLACE HEALTH PROMOTION IN THE ÖBB-GROUP

## ÖBB-Holding AG Austria

### Benefit for the Company and the Employees

When establishing a workplace health promotion in the ÖBB Group, the primary objective was to support our employees in their own preventive health care at the workplace and beyond. The actions resulted in an increase of our employees' satisfaction, health and performance. This has a simultaneous positive effect on our company's business success.

### Background and Initial Situation of the Initiative

The company and the employee representation bodies recognized that the company's business success is based on the good quality of its employees' work. This work is based on each employee's good health and fitness. Consequently, the social partners made a joint effort to initiate the concept and to develop the workplace health promotion project. Its implementation was planned for the period between 2006 and 2010.

### Implementation in the Company

The implementation in the company took place over several phases. Initially, in the diagnostic phase (2006), company-level agreement was concluded to create the prerequisites for project implementation. This was followed by an analysis of the relevant areas. The company was analysed, its employees were surveyed, and the data for time lost due to illness were collected. These results were used in the development phase (2007–2009) to discuss and define specific actions. Since 2009, the activities of workplace health management scheme have been put into practice. These activities are:

#### Health circles

Their membership consists of employees from various professional groups. They identify working conditions, which are either health promoting or constitute barriers to health. Personal health-promoting resources are evaluated. In a joint effort, relevant solutions are proposed which are both realistic and relevant for workplace health promotion (BGF).

#### Multiplier training

The multipliers ensure the bottom-up communication. The direct involvement of employees leads to a higher level of acceptance. In the operative units, data are collected on the actual needs of our employees. The multipliers' areas of activity involve facilitating the health circles, and they provide exercise coaching, NW instruction and health coaching. Almost 1,000 employees have so far been trained in these areas.

#### Working groups

The working groups discuss additional activities. They are especially oriented towards issues involving individual forms of behaviour or relationships. The first category includes exercise, diet, smoking, stress and psychological factors. The second group includes subjects such as workplace drug prevention, older employees, employees with special needs, trainees, healthy management and the multiplier training programme.

#### Awareness-raising actions

The employees are offered programmes for their personal health promotion. They include health promotion weeks, when intensive counselling is offered on subjects such as diet, exercise, stress management and no-smoking. Exercise events invite the employees to jointly participate in jogging, walking or cycling activities. These programmes are increasingly popular.

#### Job-related screening of healthy employees

In order to personalise the proactive health care effort and to increase its efficiency, ÖBB offers a job-related screening of healthy employees (berufsorientierte Gesundenuntersuchung, BOGU) together with partners. This includes, for example: 3D/4D spine and posture analyses as well as isometric measurements of maximum power. The BOGU programme allows an early detection of factors endangering a person's health or performance. It promises improved opportunities for recovery through an early detection of disorders and a sustained promotion of an individual's health awareness.

#### Target Group and Participants

Workplace health promotion is intended for all employees in the ÖBB Group.

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# WORKING CONDITIONS

## COMPANY-LEVEL WORKING HOUR PROJECTS

**Deutsche Bahn AG**  
Germany

### Benefit for the Company and the Employees

Company working hour projects result in:

1. A structural and sustainable improvement of working and deployment conditions on the operational level with a more pronounced consideration of individual interests in shift and deployment planning and thus an improved life-work balance;
2. Solutions which are realised with an active involvement of local employees and correspond to the employees' needs with simultaneous harmonisation of these solutions with the company's operating and commercial requirements. Reliable rules and criteria for deployment planning at the various places of deployment are developed in this context;
3. A stronger role of the in-company partners in designing the employees' working hours while transferring issues from the bargaining to the company level;
4. The establishment of joint "resolution and implementation planning" at the workplace, and thus contribute to a better corporate culture;
5. Existing company-level polarisations being resolved for the benefit of all parties involved.

### Background and Initial Situation of the Initiative

- a. Continuous implementation of the Bargaining Agreement of January 2009, when – inter alia – company working hour projects were agreed between the bargaining parties. The objective is to design company-level working and deployment conditions so that a structural and sustained improvement can be achieved while giving due consideration to the balance between life and work;
- b. The results of employee surveys show, in particular, that the aspect of the "life-work balance" is regarded by employees as an area in need of considerable improvement. Company working-hour projects at selected sites shall lead to a proven enhancement of employee satisfaction.

### Implementation in the Company

- Development of a project concept based on bargaining outcomes;
- Harmonisation of an overall project structure, a communication concept and a uniform "project template" involving all business areas in the corporation as well as the bargaining parties;
- Adoption of specific project principles such as:
  - Projects are joint projects and are pursued on equal terms between the corporate parties (works councils and employer),

- Active involvement of those who are directly affected, i.e. the employees themselves,
  - A search for feasible and appropriate solutions,
  - Employee workshops, which are not designed as a "Make-a-Wish" event and are based on an understanding of the effects of specific adjustment options,
  - An open and trustful cooperation of all parties involved in the project with a view to achieving the project's objectives;
- Agreement on specific actions (working hour regulations/ models) on the company level;
  - Transfer of issues from the bargaining to the company level;
  - Initiation and continuous further development of a project portfolio in the corporation;
  - Support for their local project in the form of project support from corporate headquarters;
  - Employees shall receive joint and continuous information about the project status and the project outcomes by the local corporate parties;
  - Continuous involvement of trade unions through various meetings and discussions on the company working hour projects → positive feedback;
  - Regular and transparent information about the total project and individual projects as well as regular exchange as an element in the coordination of "company working hour projects" with various levels of participation provided the essential guarantees for success and the acceptance of the projects

### Target Group and Participants

- Company working hour projects in the various business areas of the corporation with a focus on employee groups working in shift or alternating shift systems (e.g. mobile personnel (customer service employees in local transport [Kundenbetreuer im Nahverkehr (KiN)], on-board service personnel in long-distance transport [Zugbetreuer im Fernverkehr (ZuB)] - train drivers in the transport units [Triebfahrzeugführer in den Transportbereichen (Tf)]); traffic management and signal tower personnel, travel service personnel).
- Joint projects of the respective corporate parties (employer and works council) at the local workplaces.

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## PART-TIME WORK

### NMBS/SNCB Belgium

#### Benefit for the Company and the Employees

The implementation of part-time work for the employees in our railway company aimed at a better work-life-balance and work-family-balance. Part-time work offers the possibility to have a career break when it is necessary due to personal circumstances. The second part-time work arrangements concern the end of the career with the company.

#### Background and Initial Situation of the Initiative

The background of the initiative is:

- HR Regulations
- Belgian Law
- Social agreements with recognized organisations



#### Implementation in the Company

SNCB-Holding offers different types of part-time work. The employees have either the possibility to use a complete break or they can use a partial break. Working hours in a partial break can be either 32 hours/week or half-time. Reasons for part-time work are

- Parental leave
- Palliative leave → a period of one month (complete or partial)
- Care leave for a member of the household or the family who is seriously ill → a period of one month (complete or partial)

A career break is supported with a monthly allowance from the National Employment Office.

#### Arrangement for the end of career

From the age of 55 the employees have the right to work part-time (32 hours per week). This applies to the following employees:

- Employees of ranks 7, 8 and 9
- Employees of ranks 4 "lower", 5 and 6 who work in shifts
- Train staff. They are entitled to pension benefits at the age of 55 after 30 years of shift work.

#### Target Group and Participants

In principle, the initiative applies to all employees. The arrangements for the end of the career apply to special job types.

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# PART TIME WORK FOR OLDER EMPLOYEES

## NS Nederlandse Spoorwegen Nederland

### Benefit for the Company and the Employees

In connection with the employability of older people and the foreseen longer working life (up to 61/65 years), NS has created the possibility of part-time working.

The employer as well as the employee can expect that in this way an employee has the possibility to work longer in a healthy way, with more recuperation time and more time to use for other purposes.

### Background and Initial Situation of the Initiative

At NS there are some age-dependent agreements on the topics:

- Holidays
- Working-hours
- Shift working
- Various

The tendency regarding annual holidays in the Netherlands is to decrease the difference between old and young, a decrease up to 25 and the rest in personal budget (money) for everyone to use for buying time, education etc.

Regarding working hours, a full-time contract consists of 36 hrs./week on average. A normal pattern is 9 shifts of 8 hours in 2 weeks. Employees who are 59 years and older work 7.5 hours instead of 8 hours.

For employees aged 55 years and older, the possibility of part-time work on a voluntary basis was created.

Every year on a voluntary basis older employees (55 years and above) people have the possibility to opt for part-time work in the next year (Collective labour agreement à la carte).

For direct employees this means 32 hours per week in 4 shifts on average of 8 hours.

Financing by employer: maximum 4 days per year.

Financing by employee: holidays, give up short-time working ½ hour per day, money.



### Implementation in the Company

Every year on a voluntary basis older employees (55 years and above) have the possibility to opt for part-time work in the next year (Collective labour agreement à la carte).

For **direct employees** this means 32 hours per week in 4 shifts on average of 8 hours.

Financing by employer: maximum 4 days per year.

Financing by employee: holidays, give up short-time working ½ hour per day, money.

For **indirect employees** this means 34 hours per week in 4 shifts of on average 8.5 hours.

### Target Group and Participants

This agreement is directed to all employees.

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NS

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# JOB MOBILITY ARENAS (ESPACES MOBILITÉ EMPLOI, EME)

**SNCF**  
France

## Benefit for the Company and the Employees

Thanks to personalised support and enhanced training, the career development of employees will be encouraged by devising enriching and qualifying career development options, particularly for employees whose job is at risk.

This is done in such a way that the right competences are available to the company at the right place and time and by encouraging functional and geographical mobility.

## Background and Initial Situation of the Initiative

In a context which is characterised by more and more rapid evolution of occupations and competences, by internal restructuring that enhances the need to address issues of employability, especially for persons whose position is discontinued, and by matching the jobs to the available age and geographical resources as well as the increasingly complex competences, the major challenge for the company is to reconcile the demands of competitiveness on the one hand with guaranteeing employment on the other by pursuing policies focusing on an active management of employment and competences: **New Occupational Dynamics (Nouvelle Dynamique Métiers)**.

Initiated in 2009, this approach aims at promoting the functional ability and the development of personnel with priority given to those employees whose positions are discontinued. In this context, dedicated organisations have been established **the Job Mobility Arenas (Espaces Mobilité Emploi)** to provide personalised support to employees and enhanced training to promote their access to meaningful occupations in the company and to professional qualification schedules.

## Implementation in the Company

In the framework of the New Occupational Dynamics, **23 Job Mobility Arenas** have been established (one in each region); they consist of a network of 100 dedicated persons (mobility counsellors, persons in charge of competence development ...) and work for the benefit of employees in a mobility situation and the business units.

Their mission is to support employees confronted with forced or voluntary functional or geographical mobility by:

- Providing the necessary visibility as regards their employment opportunities with SNCF and the group;
- Offering them personalised and “made-to-measure” support services which will assist them in developing and specifying their realistic career planning;
- Keeping them in touch with the work realities throughout their reorientation (temporary postings or exploratory internships may be proposed).

Persons whose job has been discontinued are individually supported in the EME of their region. They are seconded to them on a full-time basis. After taking stock of their careers and their competences, employees are accompanied by a mobility counsellor in drawing up their career plans. They may benefit from a series of services (counselling interviews, workshops, exploratory internships, competence assessments, evaluations ...). Once the target occupation and the receiving entity have been identified, a transfer contract is formally concluded with this entity. The employee thus benefits from all the training (refresher training, pre-qualification training, vocational training ...) necessary to take up his/her new occupation. At the end of this scheme, which takes up to 18 months for intensive training, the employee is integrated into his/her new entity.



## Target Group and Participants

All company employees, but with priority given to those whose position is at risk.

Operatives and supervisors are hosted by the regional EMEs, while managers have a special Manager Development Arena (Espace de Développement des Cadres) which is located in Paris.

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# FLEXIBLE END-OF-CAREER MANAGEMENT

**SNCF**  
France

## Benefit for the Company and the Employees

Permitting employees and especially employees who have worked in difficult conditions to transform their work activity into part-time employment or to take early retirement.

They are offered an option to manage and to use their available time by saving up days of annual leave or rest days to compensate for time off at the end of their working life, before they leave the company.

Against the background of an extended duration of the employees' working life, it is beneficial for the company to have measures to accompany these pre-retirement periods especially out of real concern for protecting those who have worked in difficult conditions over many years.

## Background and Initial Situation of the Initiative

The pension reform of 2008 results in an extension of the average age of retirement at SNCF and an increasing number of older employees in the company. (The share of employees over 55 rose accordingly from 1.7% in 2007 to 4% in 2009). On the other hand, more than 50% of the workforce was or still is working in difficult conditions.

In the framework of an active age management policy (Older Employee Plan [Plan Seniors]), the company has taken measures with a view to managing the career of older employees, passing on their knowledge and managing their pre-retirement with a particular concern for protecting those employees who have worked in difficult conditions.

Two collective agreements were concluded for this purpose in 2008: on the management of pre-retirement working hours and on time savings accounts.

## Implementation in the Company

- A **collective agreement** concluded in 2008 on:
  - 1- **the Progressive Retirement Scheme (cessation progressive d'activité, CPA)** allows an employee to transform his/her full-time employment into part-time employment before retiring altogether (over a period of three years: working at 80% of regular hours during the first years and at 60% in the third year; or over a period of one year: with 50% of the hours or an opportunity to stop working six months earlier). The employee receives a CPA compensation and has an option to pay supplementary contributions to his/her pension to bring it up to the rate for full-time work. For employees having worked in difficult conditions, the CPA compensation is increased and pension contributions matching the rate for full-time work are paid by the company. The duration of the CPA scheme may vary from 12 to 18 months depending on the

number of years the employee worked in difficult conditions.

- 2- **Pre-retirement part-time work** may be granted for periods between one and three years beyond the age of the initial pension entitlement. The working hours amount to 91.4% of the full-time hours through an allocation of non-working days. This part-time work is counted as full-time work for the calculation of pension entitlements, and the company pays the contributions.
- A **collective agreement on the time savings account (comp-te épargne temps, CET)** was concluded in 2008: this new system allows employees to save up their days of annual leave and rest days to either organise short-term absences during their working life or to provide for their time off at the end of their working life / pre-retirement part-time work. In case of providing for time off at the end of their working life or pre-retirement part-time work, the company increases its top-up contribution to the company savings scheme by 50%.

## Target Group and Participants

All employees with at least 23 years of seniority may benefit from the measures to manage their pre-retirement working hours. Employees having worked in difficult conditions are the primary target group (90% of the beneficiaries of the agreement have used the CPA system with the fixed formula for difficult working conditions allowing them to retire early).

All employees with at least one year of seniority may set up a time savings account (CET).

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DIRECTION  
DES RESSOURCES HUMAINES



# COMPANY-LEVEL AGREEMENT ON LONG-TERM WORKING HOURS ACCOUNTS

**Deutsche Bahn AG; Eisenbahn- und Verkehrsgewerkschaft (Railway and Transport Workers' Union, EVG)**  
Germany

### Benefit for the Company and the Employees

The social partners have concluded a company-level agreement on long-term working hours accounts for the employees of DB AG. This long-term working hours account allows a more flexible design of certain life phases of an individual employee. The long-term working hours account is used to manage the employee's future leave-of-absence periods with full pay. Transitional phases in the working-hour structure and sabbaticals are made possible. In order to manage the entitlements accumulated in the long-term working hours accounts, a monetary asset credit/balance is created for each employee.

### Background and Initial Situation of the Initiative

The conclusion of the company-level agreement on long-term working hours accounts is based on various factors such as the increasing average age of the German population and the employees in DB Group as well as the shortage of skilled labour in some areas of the company.

The parties to this company-level agreement created a joint institution in the form of an Asset Fund, and this Fund was mandated to manage and process the assets originating in the long-term working hours accounts.

### Implementation in the Company

The long-term working hours accounts enable employees to save their remuneration, and these savings are free of income tax and social security contributions. The long-term working hours account is used to manage future leave-of-absence periods with full pay. In addition to amounts paid out of an employee's regular remuneration, it is also possible to invest sums in the long-term working hours accounts which originate from one-off payments or remuneration for overtime, if and when such a provision is included in the agreement. Remuneration assets are then created in the long-term working hours accounts and will bear a suitable interest.

An amount of monetary assets is then created individually for each employee to handle his/her claims from the long-term working hours account. These assets are managed as a remuneration credit/balance and include the employer's share of the total social security premiums which would have been payable for these assets. The crediting of these assets is managed by the Asset Fund. The Asset Fund will provide an annual information statement to the employee on the total remuneration assets/balance saved and invested in the asset balance. The accumulated remuneration credit including any appreciation will be subject to the deferred taxation of pensions.

The long-term working hours account also permits a leave of absence and payouts of the asset balance. It may be used for an early retirement from active employment before the regular national retirement age, for vocational further education and qualification, for caring for close family members pursuant to §3 of the Act on Care Time (Gesetz über die Pflegezeit), for childcare pursuant to §15 of the Federal Act on Parenting Benefits and Parental Leave (Bundeselterngeld – und Elternzeitgesetz) and for reducing the contractually agreed working hours pursuant to §8 of the Act on Part-Time and Temporary Employment (Teilzeit- und Befristungsgesetz). The employee has to file an application for the payout phase, and certain deadlines will have to be respected.

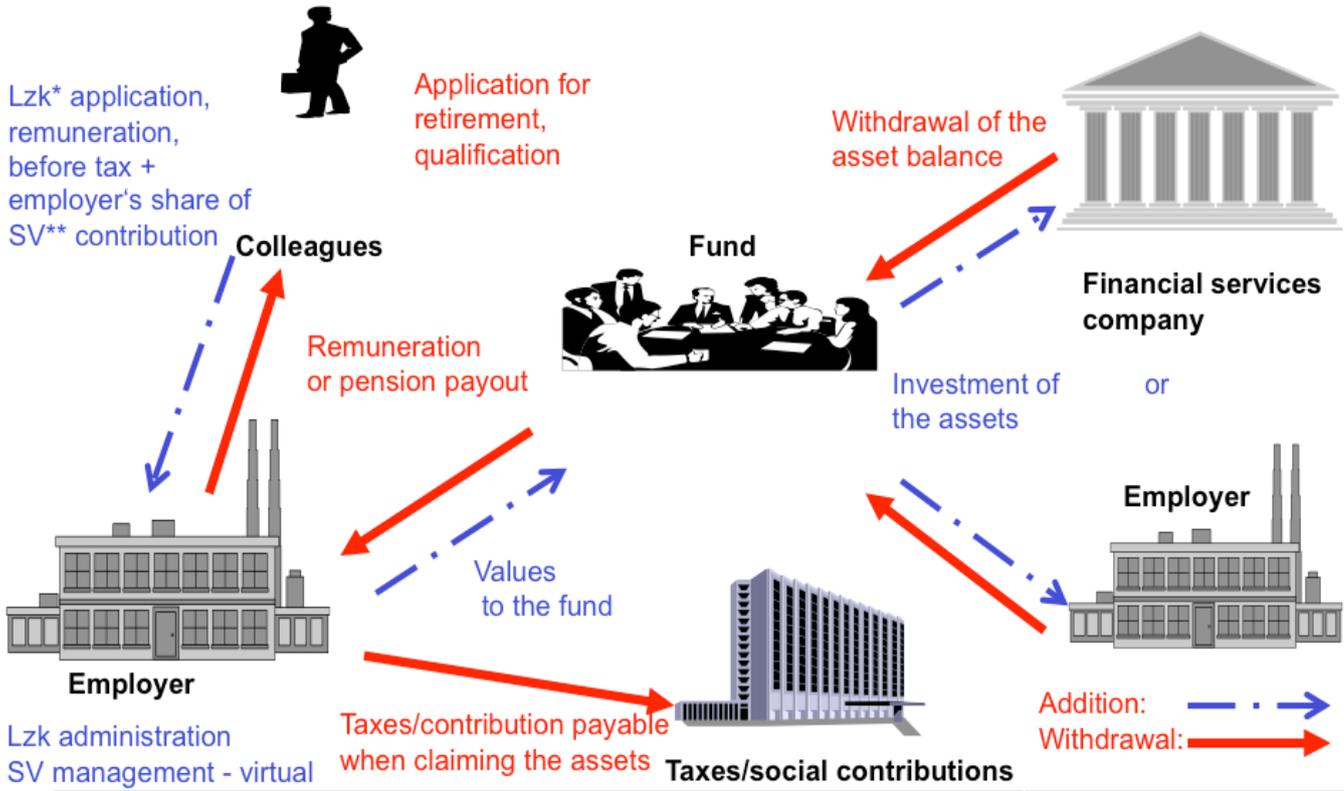
### Target Group and Participants

The company level agreement on long-term working hours accounts was concluded for all interested legal entities in the DB Group.

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# Structure of the Arrangement



\*LzK (Langzeitkonto)= Long-term working hours account

\*\*SV (Sozialversicherung) = Social security



# TOOLS

## DEMOGRAPHICS COMPASS (DEMOGRAFIEKOMPASS) – MAPPING THE COMPANY’S AGE STRUCTURE UND IDENTIFYING THE NEED FOR ACTION

In the analysis of the age structure, you collect data on the age distribution in the workforce of the company or individual units and departments. You will receive additional information by extending the analysis and adding further data on factors such as age, qualification, functional area, position or gender.

The calculation of forecasts will allow you to identify at an early stage whether and to what extent a need for action arises for the company as a result of its ageing workforce. By taking stock of the age structure in various areas and groups of employees, you will be able to identify them in greater detail. Potential features are the:

- employees’ age at the cut-off date
- membership in departments or units
- position in the company
- qualification or education and training
- gender
- type of employment
- seniority

Model calculations setting out the age structure at regular intervals are a core element of all analyses of data structures. The results provide you with the

- a) increase or decrease of the number of employees in certain age groups
- b) amount of personnel needed due to the retirement of employees.

These calculations are highly meaningful as long as they are carried out in a differentiated fashion for the areas and departments of a company or specific groups of employees.

With the Demographics Compass (DemografieKompass) software tool, you can rapidly and easily explore your company’s age structure. The results tell you in which areas a need for action arises due to the ageing of the workforce or the retirement

of individual employees. The Demographics Compass (DemografieKompass) is a tool for entrepreneurs, HR managers, works councils and staff representation bodies. The commercial use of the Demographics Compass (DemografieKompass) software is free of charge, when the licensing conditions for TBS Software are respected.

In five steps, the Demographics Compass provides you with an overview about the current situation in your company and allows you to develop forecasts for the future.

You can start your analysis and forecast of your company’s age structure directly by accessing Demographics Compass (DemografieKompass) Online at: [www.demobib.de](http://www.demobib.de) or by installing Demographics Compass for Windows (DemografieKompass für Windows) on your PC.

Step 1: Entry of the total number of employees

Step 2: Entry and definition of categories

Step 3: Abbreviated or detailed analysis

Step 4: Mapping the age structure

Step 5: Assessment and evaluation of results

In this last step, you see the results of your analysis of your company’s age structure. In the following step, you can develop a forecast for the future.

### Contact Person:

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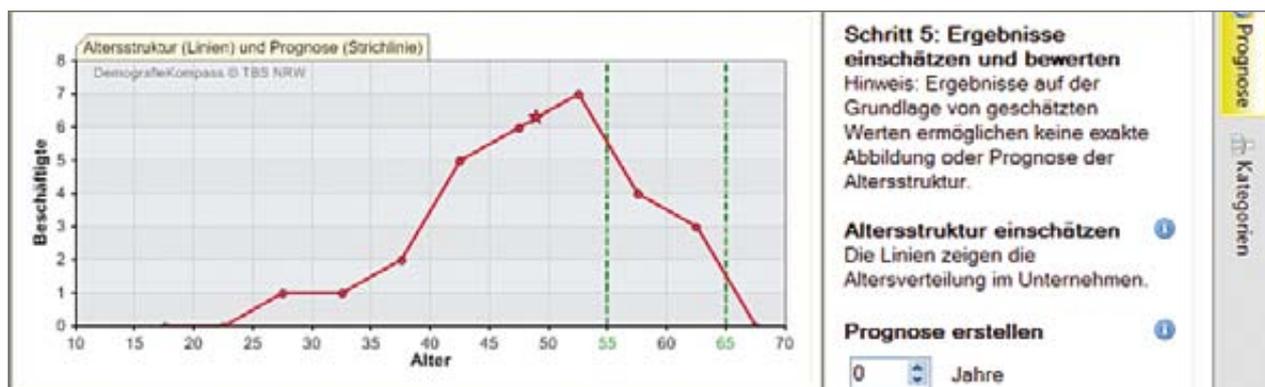
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# SELF-CHECK (SELBSTCHECK) EMPLOYABILITY 2.0

## What is the Self-Check (SelbstCheck)?

The Self-Check Employability 2.0, developed by TBS NRW permits employees, persons with professional experience as well as students to assess their own employability. The guidebook to Self-Check Employability 2.0 permits an individual assessment of the results, a determination of the need for action as well as an identification of objectives and measures.

The constraints and conditions promoting employability in a company may be assessed with the Company Check (UnternehmensCheck) 2.0 software, which is also available online.

Just like all interested individuals, you may use Self-Check Employability 2.0 to assess your own employability. The personal use of the Self-Check software will be available to you free of charge.

The questionnaires are designed as a practical tool. They are oriented to the principles of qualitative social, health and educational research and reflect factors impacting on an individual employee's social and professional competence, health, personal responsibility and integrative skills.

The Self-Check Employability 2.0 questionnaire consists of approximately 115 questions. They are broken down into the seven dimensions of employability.

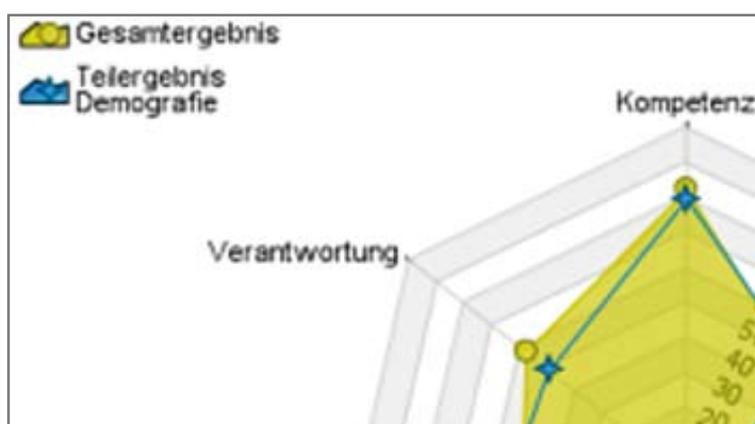
- Competence
- Health at the workplace
- Health and medical complaints
- Learning skills
- Integration
- (Self-)Management
- Responsibilities

In addition, there are groups of questions within these dimensions to map certain pivotal issues such as "Physical stresses" in the dimension on "Health at the workplace" or "Motivation for learning" in the "Learning skills" dimension.

Self-Check Employability 2.0 provides you with a comprehensive offer to improve your individual employability especially in combination with additional work on the outcomes of the Self-Check, which are found in the demoBiB guidebook.

## How do I get an evaluation of the questionnaire?

When you have answered questions from at least two dimensions, the software will show you a spiderweb diagram assessing the questions you have answered. The spiderweb graphics show your overall employability result (green area) and the result for the sub-field of demographics (blue line) within the Self-Check. The result for the demographics subgroup contains questions which are of particular significance for maintaining your employability throughout your working life.



Ill. 5: Graphic presentation of the overall outcome (green area ) and the results for the demographics subgroup (blue line) in a spiderweb diagram

# COMPANY CHECK (UNTERNEHMENSHECK) 2.0 EMPLOYABILITY IN THE COMPANY

TBS NRW has developed the “Company Check (UnternehmensCheck) 2.0 Employability in the company” which will support you in taking stock of the framework and employability constraints in your company. Irrespective of the industry and the size of the company, the potential existing in the company is tapped and assessed.

Company Check 2.0 will enable you to make structured assessments of the employability dimension of your company. It will give you an overview on possible fields of action to improve employability.

It will create a common basis for discussions between the players in a company or a selected company unit/division. Against the background of the specific situation of the company, it must be ascertained which changes or improvements may be realised as part of the company’s scope of opportunities and which priorities are meaningful.

The tool “Company Check 2.0” provides support to company level decision-makers such as the management, the works council or the HR management and assists them in their orientation and identification of issues. In the context of their activities in specific companies, it is an orientation and intervention tool for consultants. The use of the Check is particularly significant for the various groups of employees in the company. Only when they are actively involved, it will be possible to arrive at a participation-oriented and comprehensive analysis and handling of thematic areas.

The identification of issues at the beginning of a project is also included in the scope of Company Check 2.0. Furthermore, this tool is also used for the assessment and evaluation of activities and outcomes. One of its many other potential applications involves raising the awareness of stakeholders or decision-makers and supporting discussion and decision-making processes.

**Structure of Company Check 2.0**  
Between seven and 13 questions on work activities and workplace situations are asked in Company Check (UnternehmensCheck) 2.0. Each question comes with five potential answers (ranging from “low” to “high”). Some of the questions are directly related to the employees and their opportunities for action. The questions focus on the constraints and conditions for employability to the extent they are determined by the company. Questions which do not apply to a specific company situation may be left unanswered.

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# THE ELEMENTS OF PERSONAL AND CORPORATE EMPLOYABILITY

The employability model developed by the demoBiB project covers this diversity in seven dimensions. This concept is applied both in a Self-Check (SelbstCheck) of a person's employability and in a Company-Check (UnternehmensCheck) of the employability aspects of a company.

yability and in a Company-Check (UnternehmensCheck) of the employability aspects of a company.

	Personal employability	Dimension	Corporate employability	
Demographic change: personal potential and conditions for maintaining a person's employability throughout his/her working life	<ul style="list-style-type: none"> <li>• Communicative competences</li> <li>• Stamina and tolerance of frustration</li> <li>• Organising skills</li> <li>• Innovative skills</li> <li>• Network thinking</li> <li>• Congruence of the job and personal competences</li> </ul>	<b>Competence</b>	<ul style="list-style-type: none"> <li>• Creating the basics</li> <li>• Professional qualification</li> <li>• Process know-how and problem solving competence</li> <li>• Self-control and cooperation</li> </ul>	Demographic change: beneficial plant-level conditions and appropriate workplaces for ageing workforces and older employees
	<ul style="list-style-type: none"> <li>• Physical stresses</li> <li>• Mental stresses</li> <li>• Health-promoting job design</li> </ul>	<b>Health at the workplace</b>	<ul style="list-style-type: none"> <li>• Physical stresses</li> <li>• Mental stresses</li> <li>• Health-promoting job design</li> <li>• Health-promoting management style</li> <li>• Appropriate workplace design for specific age groups</li> </ul>	
	<ul style="list-style-type: none"> <li>• Personal physical problems</li> </ul>	<b>Health and medical problems</b>	<ul style="list-style-type: none"> <li>• Only in Self-Check (SelbstCheck)</li> </ul>	
	<ul style="list-style-type: none"> <li>• Motivation to learn</li> <li>• Willingness to accept new tasks</li> <li>• Ability to accept new tasks</li> <li>• Learning experiences</li> <li>• Ability to design a change of activity at the workplace</li> </ul>	<b>Learning ability</b>	<ul style="list-style-type: none"> <li>• Activities which foster learning</li> <li>• A management culture , which fosters learning</li> <li>• Prerequisites for education and qualification</li> <li>• Quality of corporate further education</li> <li>• Willingness to participate in further education</li> </ul>	
	<ul style="list-style-type: none"> <li>• Social networks</li> <li>• Willingness to share knowledge</li> <li>• Consensus-finding skills</li> <li>• Team-working skills</li> <li>• Openness to support</li> <li>• Working atmosphere</li> <li>• Inter-group cooperation</li> </ul>	<b>Integration</b>	<ul style="list-style-type: none"> <li>• Diverse workforce</li> <li>• Tapping the employees' potential</li> <li>• Appreciation and active integration</li> <li>• Working atmosphere</li> </ul>	
	<ul style="list-style-type: none"> <li>• Work-life balance</li> <li>• Emotional stability</li> <li>• Geographical mobility</li> <li>• Openness to flexible working hours</li> <li>• Attitude towards work at a higher age</li> </ul>	<b>(Self-) Management</b>	<ul style="list-style-type: none"> <li>• Work organisation</li> <li>• Personnel planning and development</li> <li>• Good leadership</li> <li>• Activities adapted to specific life phases</li> </ul>	
	<ul style="list-style-type: none"> <li>• Willingness to take decisions and accept responsibility</li> <li>• Responsibility for improvements and company development</li> <li>• Willingness to participate in further education</li> </ul>	<b>Responsibility</b>	<ul style="list-style-type: none"> <li>• Employment security</li> <li>• Participatory culture</li> <li>• Personal responsibility of individual employees</li> </ul>	

# INTRODUCTION OF THE SURVEY

The project “Employability in the face of Demographic Change – Prospects for the European Rail Sector” intended to provide personnel managers and employee representatives with practical input and ideas to handle the topic of employability and demographic change. If the suggestions were to point in the right direction and take into account the demands and needs of the companies and employees, it was important to know more about the situation in the European rail companies. In order to obtain a detailed picture of the demographic and employment trends in the companies and to hear the opinion of the actors, the project steering committee members initiated a survey. The survey was addressed to the personnel managers and employee representatives who deal with questions of personnel planning.

The questions were chosen from the angle of scientific and empirical aspects. A structure of five important areas was identified, which cover the topic in the best way:

- 1) General Data
- 2) Age Structure and Working Areas
- 3) Staff Planning
- 4) Employment Situation
  - a. Working Conditions
  - b. Health Promotion
  - c. Training Measures
- 5) Measures related to Demographic Change

The survey was sent to the affiliates of the European Social Partners of the railway sector, CER, EIM and ETF. The Steering Committee received 35 answers from 19 countries. They included personnel managers from 31 companies, 5 companies which answered together with the union and 4 trade unions which replied. From some countries we received several answers, either from more than one company or from companies and unions.

The intention was to give a clear overview and at the same time to include all necessary information in the analysis. Therefore the legends of the following diagrams need some explanations:

- Not every questionnaire was filled in completely. If some questions were left open, the cross sum of the diagrams does not always add up to 35, which would be the total sum.
- The answers given are marked with the country code, not with the companies' or trade unions' name. This is to maintain the clarity of the survey. Several answers from one country are put together in one country code.
- We also received different answers from companies or trade unions from one country. If participants from one country marked different answers or did not mark an answer, the country code is put in brackets.

The answers represent the opinion and the situation of the participating companies and trade unions. The survey is not meant to be a statistical analysis for the whole railway sector in Europe.

We thank the participants for their support of the survey. They helped to provide a very detailed picture of the situation of employability and demographic change in the European rail companies.



The Voice  
of European  
Railways



European Rail  
Infrastructure Managers



## “Employability in the face of Demographic Change – Prospects for the European Rail Sector“



## “Beschäftigungsfähigkeit im demografischen Wandel – Perspektiven für den europäischen Eisenbahnsektor“

### Survey

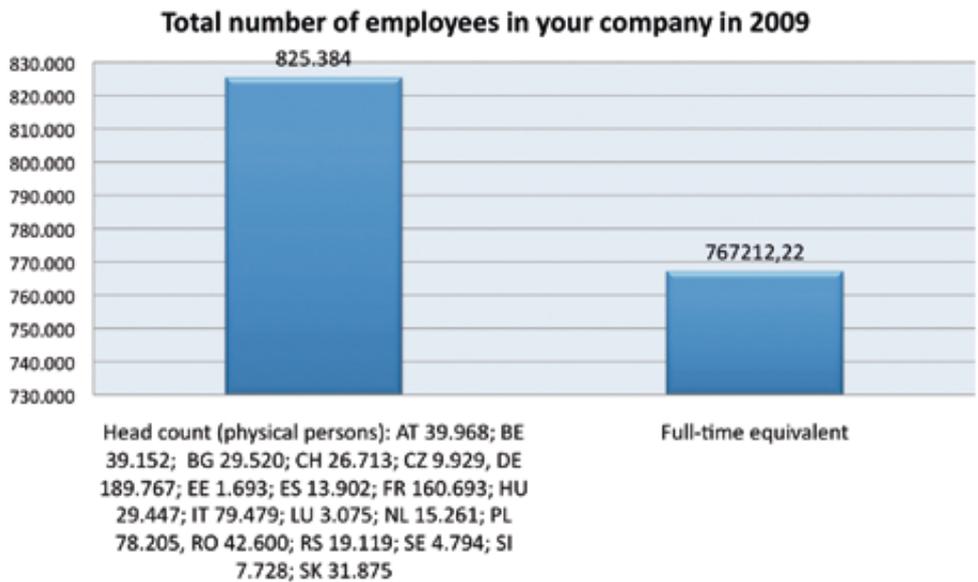
\*Mit finanzieller Unterstützung der EU  
With financial support of EU



1) Participants: 35 Answers from 19 Countries



2) Age Structure and Working Areas

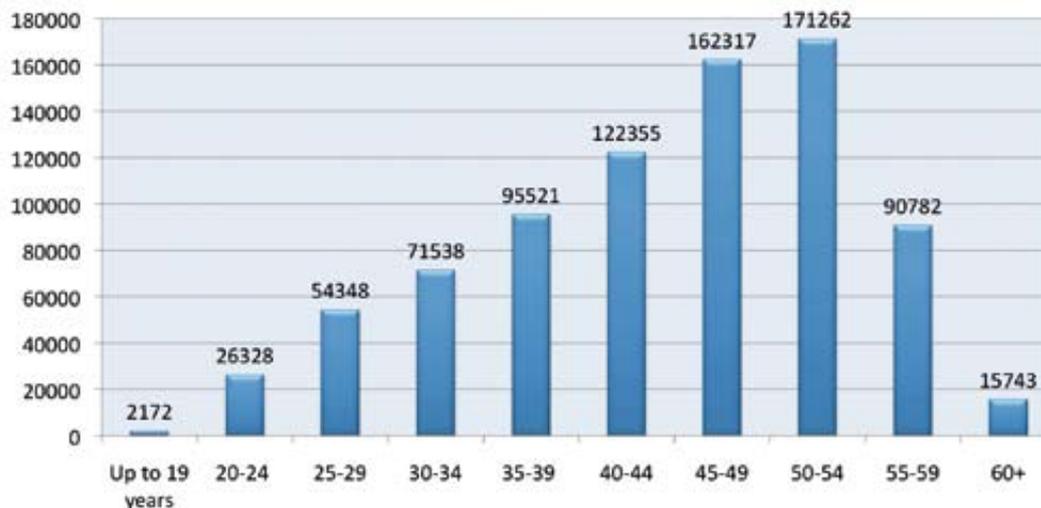


Survey responses allowed a portrayal of the situation facing 825,384 employees, corresponding to an equivalent of 767,212 full-time positions. As the full-time equivalents in 3 countries were not given, this latter figure can be assumed to be 806,488. Company size varies

considerably. The numbers of company employees range from 1,693 in EE to 189,767 in DE. Employee numbers are given in the legend. The figures for HU, LU, PL, RO, SK and SE are aggregate figures, as in each of these countries a number of companies responded to the survey.

## 2) Age Structure and Working Areas

Total number of employees by age brackets

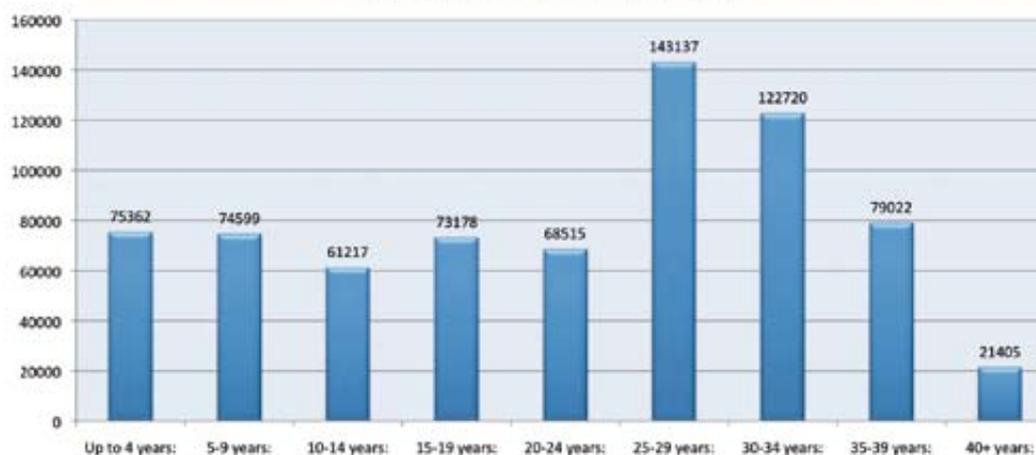


This diagram shows the employees of participating rail companies broken down according to age. There are a total of 812,366 employees. One company provided no figures on the spread of ages. Figures reveal that in the companies participating in the survey

- 54 % of the workforce are older than 45
- 34 % of the workforce are older than 50.
- 19 % of the workforce are under 34 (= 154,386 employees)

## 2) Age Structure and Working Areas

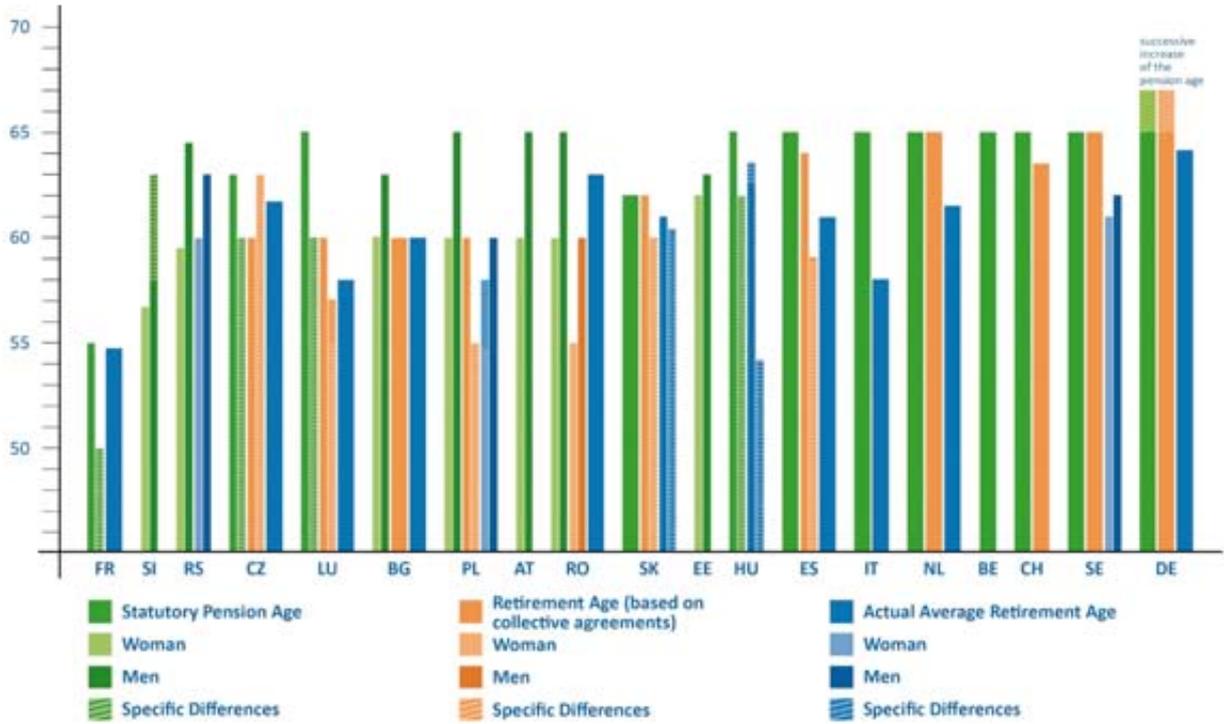
Average length of service of workforce. For how long do the employees currently work in the company:



Over 50% of employees have served more than 25 years in their company.

2) Age Structure and Working Areas

2.4 Retirement Age



To enable an assessment of years spent working in the sector, a comparison was made of the ages at which pensions begin to be drawn in the different countries of Europe. Statutory pension age (green), retirement age based on collective agreement (if applicable, orange) and actual retirement age (blue). Statutory retirement ages vary widely, set at 60 or below in FR, SI and RS (for women). The standard

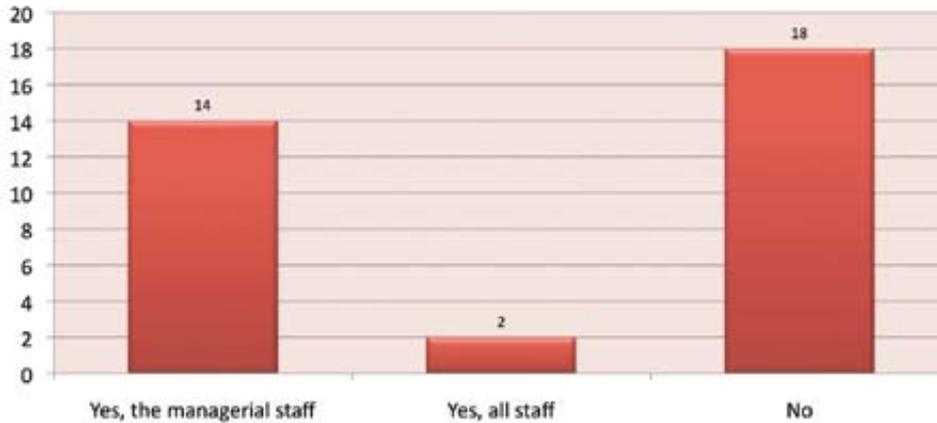
age is 65, with other countries specifying retirement at 60, 62 and 63, in some cases with disparities along gender lines. In a little under half of the countries represented, collective agreements have established different retirement ages for certain job categories. The most common occupations mentioned were engine drivers (x7) then train crews and shunting staff (x3 respectively).

## 2) Age Structure and Working Areas

Country	Statutory Pension Age	Retirement Age (based on collective agreements)	Actual average retirement age in the company	2.5 Different retirement ages for different job types/activities
FR – France	50/55		54 years, 8 months	50 for train drivers
SI – Slovenia	Women 56,8; Men 58–63			Engine drivers, shift workers, station masters rolling stock inspectors. For job with taken to account increased length of service
RS – Serbia	For women: 59 years and 6 months or 38 years of work experience; for men: 64 years and 6 months or 40 years of work experience,	As in Labour Law	For men: 63 years or 40 years of work experience, for women: 60 years or 35 years of work experience	
CZ – Czech Republic	60–63	60–63	61,81	
LU – Luxembourg	60/65	60, 55/57	58	Personnel with rolling service (rail/road) who have worked for a min. of 15 years, can retire at the age of 55. Personnel with 24-hour shift service can retire at the age of 57.
BG – Bulgaria	Women 60; Men 63			Yes, for: 12 12 0 up to 31.12.2020 - loco drivers 52; dispatcher, manager of traffic, shunter, switcher, wagon registrar – 57 for men, 52 for women
PL – Poland	Women 60; Men 65	60/55	58/55 Women; 60 Men	Specific groups of employees (drivers, shunters) . Male 60 years. train drivers, train conductor, ticket collector, shunter
AT – Austria	Women 60; Men 65			
RO – Romania	Women 60 (58,75); Men 65 (63,75)	Men 60; Women 55	63	Locomotive driver; secondary locomotive driver; trainer locomotive driver
SK – Slovakia	62	60–62	61/ 60,3	
EE – Estonia	Women 62; Men 63			
HU – Hungary	62–65	No	63,6; 54; 62,5	There is the option for pre-retirement
ES – Spain	65	-> 59, < 64	61	According to law, rail workers who have done physical labour can voluntarily retire earlier
IT – Italy	65	No	58	Drivers, on-board staff, skilled workmen, ferries' staff members
NL – The Netherlands	65	65	61,5	
BE – Belgium	65			55 for train drivers, conductors with 30 years of rolling service
CH – Switzerland	65	63,5		
SE – Sweden	65	65	62 Women, 63 Men	No
DE – Germany	65–67 successive increase of the pension age	As in law	64,15	No

### 3) Staff Planning

**3.1 Do your staff know about the joint recommendations on employability adopted by the EU social partners CER, EIM and ETF in 2007?**



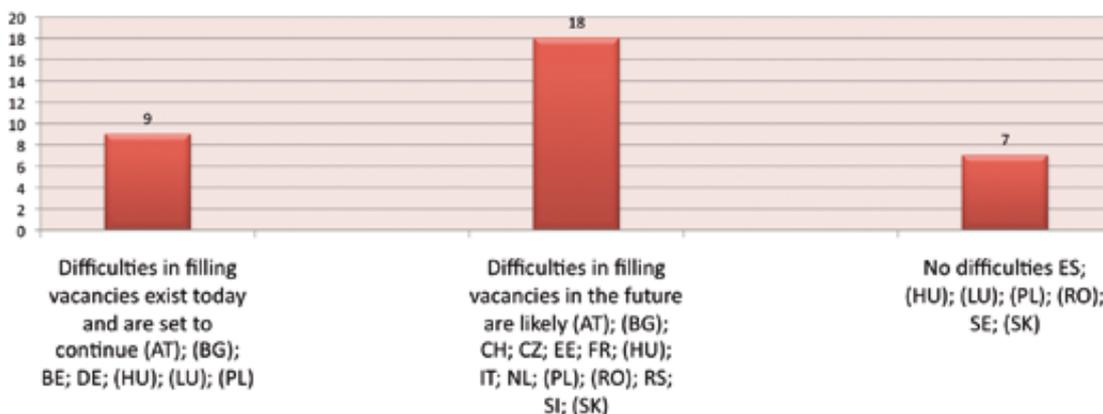
Definitions of the concept of “employability” range from the assertion that the term has no definition to the adoption of the term in collective agreements and company reports.

The term is associated with the following ideas:

- Preservation of work efficiency
- Ability to function in the labour market by virtue of know-how and good health
- Life-long learning and skill-set enlargement
- Happiness at the workplace; risk assessment conducive to problem solving
- Management of employees’ job-related ‘life phases’ as a component of collective agreements
- Support when firms are laying off staff; stabilisation of employment rate

### 3) Staff Planning

**3.3 Do you think that demographic change will have an impact on recruitment in your company in the future?**



7 out of the 34 respondents do not expect the demographic shift to affect recruitment in their companies (ES, HU, PL, RO, SE, SK). Possible reasons: the overall need for staff diminishes and vacancies are filled accordingly.

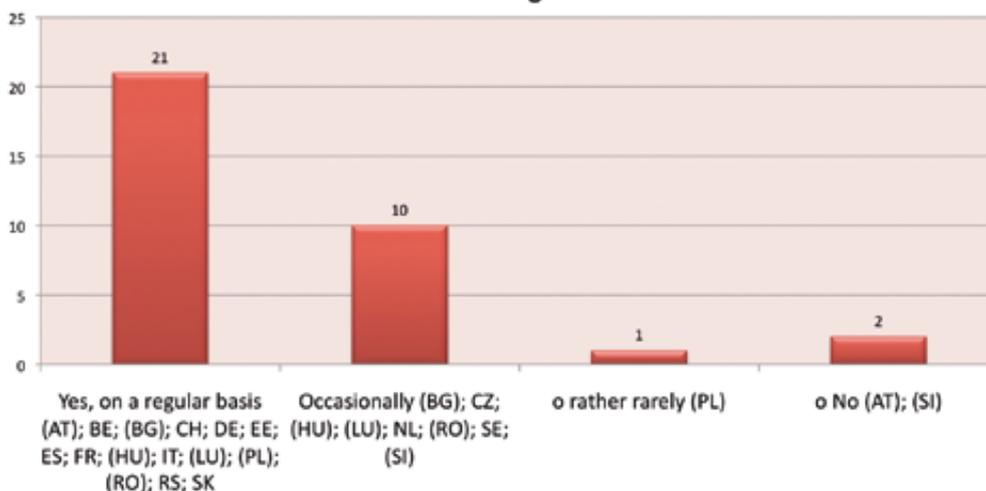
27 respondents expressed the opinion that the shift will affect, or has already affected, recruitment. Analyses and prognoses must be used to counter this tendency in these companies.

Expectations of negative impacts on recruitment were further broken down into effects on individual occupations. The following occupations cropped up several times:

- Technical services at all levels (e. g. maintenance, communications)
- Rail-related services (infrastructure, operations)
- Engineers
- On-board staff
- Young, entry-level staff

### 3) Staff Planning

#### 3.5 Does your company perform a regular job-specific analysis of your workforce's age structure?

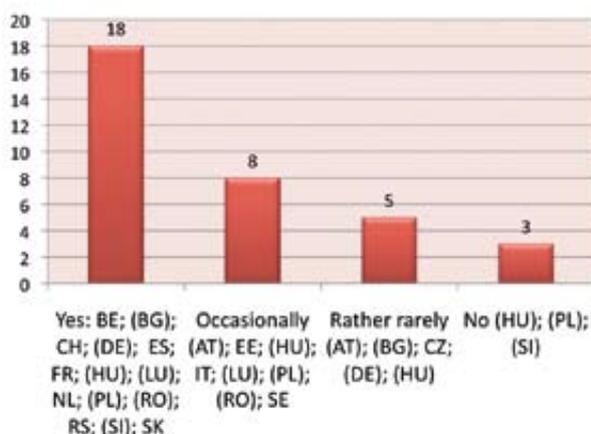


In the area of HR planning, job-related analysis of the age spread is an instrument for measuring and evaluating the staffing situation. 31 respondents said that they conducted an analysis regularly or occasionally. From this it is apparent that the instrument is widely used. Only 3 respondents said they rarely or never carried out an analysis. In the context of age-spread analysis 18 participants said they used

an early-warning system to alert them to staff shortages, systems that were used to varying degrees. Most are based on age-spread analysis but some respondents mentioned HR software programmes, business planning software, annual analyses, a long-term HR planning system or a rationalisation programme. 7 respondents reported no early-warning system.

### 3) Staff Planning

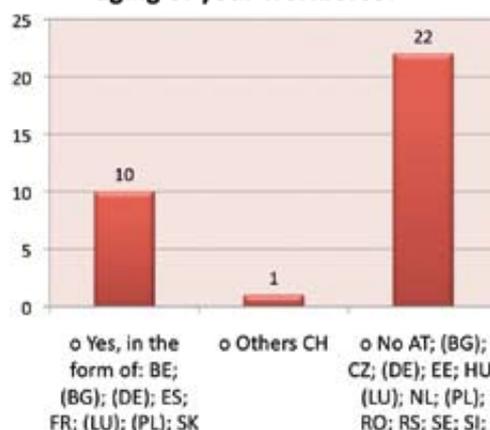
#### 3.7 Does your company draw up short-, medium- and longterm forecasts relating to its staff requirements?



Independently of the age issue, respondents were questioned on their prognostications regarding specific requirements placed on staff and relating, for instance, to the number of requirements and specific qualifications looked for in certain areas. 26 companies reported making partial prognoses or frequently making full prognoses relating to the following factors:

- Required number of employees and desired level of qualification
- Type of qualifications required
- Age pyramid
- Demand for staff due to employees taking early retirement

#### 3.8 Do you have corporate guidelines or policies on the aging of your workforce?



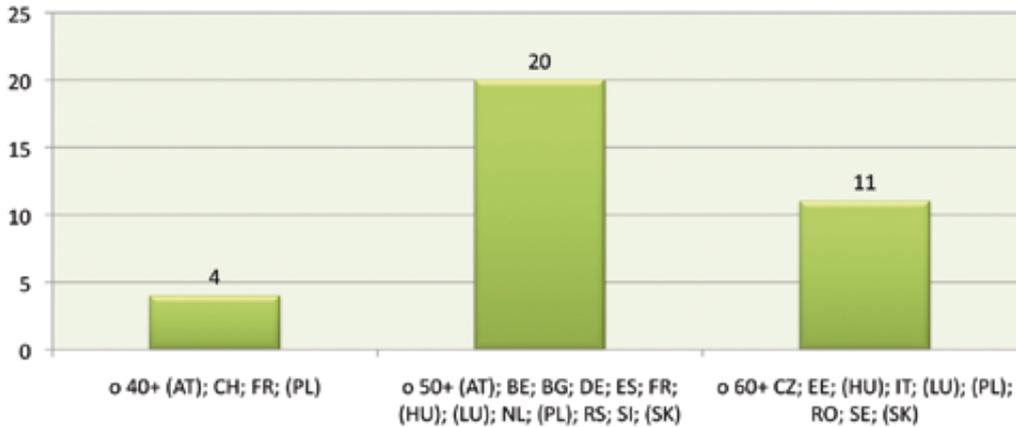
- Anticipated workload
- Transport plan

Eight companies make few or no prognoses.

Most of the 22 respondents state that their company guidelines do not actively address the issue of ageing workforces and their companies do not have policies on the subject. However, 11 respondents said it was touched on in collective agreements or guidelines. Programmes exist that focus on the time leading up to retirement or on the recruitment of young, entry-level staff.

#### 4) Employment Situation

**4.1 In the following section, we ask questions particularly regarding "older" employees. From what age do you consider staff "older" in your company?**

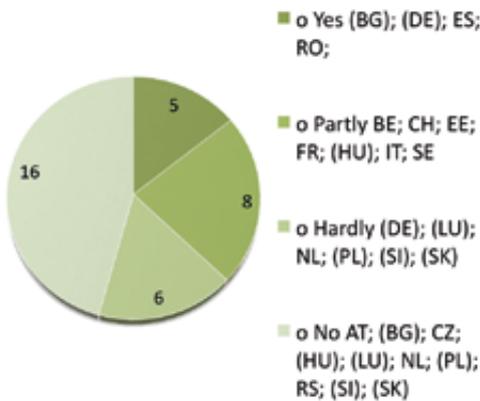


The fourth area of the survey looks at the employment situation as it relates to employability within companies, in particular that of older staff. In the same way that questioning on employability throws up different definitions of the term, so questioning as to the age at which

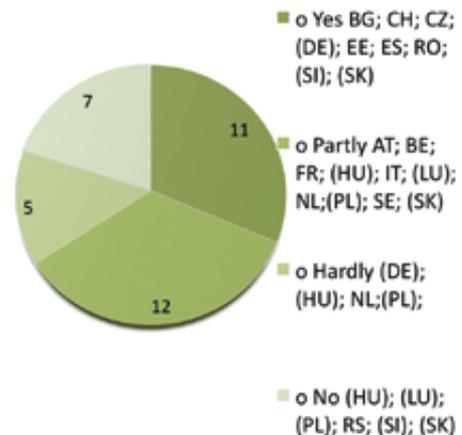
employees are considered "older" produces very different responses: age 40 upwards (AT, CH, FR, PL); age 60 upwards (CZ, EE, HU, IT, LU, PL, RO, SE, SK). Consequently, in-house measures targeting older employees would apply to quite different groups of employees.

#### 4) Employment Situation – Working Conditions

**4.2 Do corporate workplace analyses take the special needs of older employees into account?**



**4.3 Do corporate workplace analyses assess the requirements, workload and stress related to the different workplaces?**

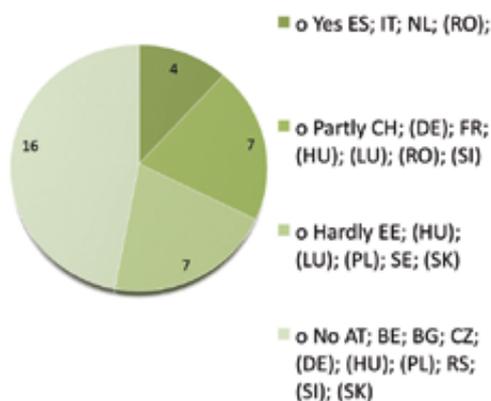


Thirteen companies consider, to a greater or lesser extent, the special needs of older employees in their workplace analyses. In 22 companies these needs are rarely or never taken into account in analyses. More common subjects of analysis are the demands and stresses

placed on employees by the job/workplace, regardless of age of employee. 23 respondents say that their analyses cover this issue fully or partially; 12 respondents say it is covered rarely or not at all.

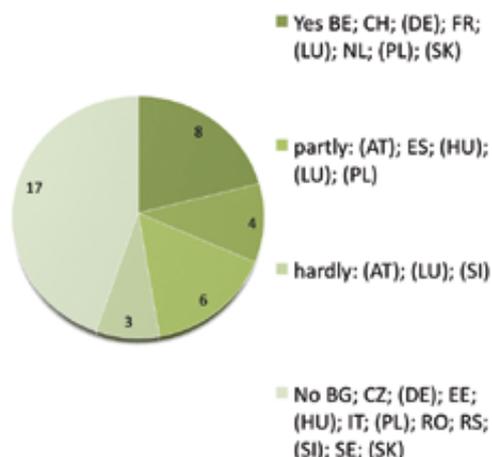
#### 4) Employment Situation – Working Conditions

**4.4 Are older employees given the possibility to adapt work processes and their work pace to their individual capacity?**



To the question of whether employees are able to adapt the pace of operations to their own capacities, most respondents (23 out of 34) said that this is not, or rarely, the case. In 11 companies this is wholly or to a certain extent possible.

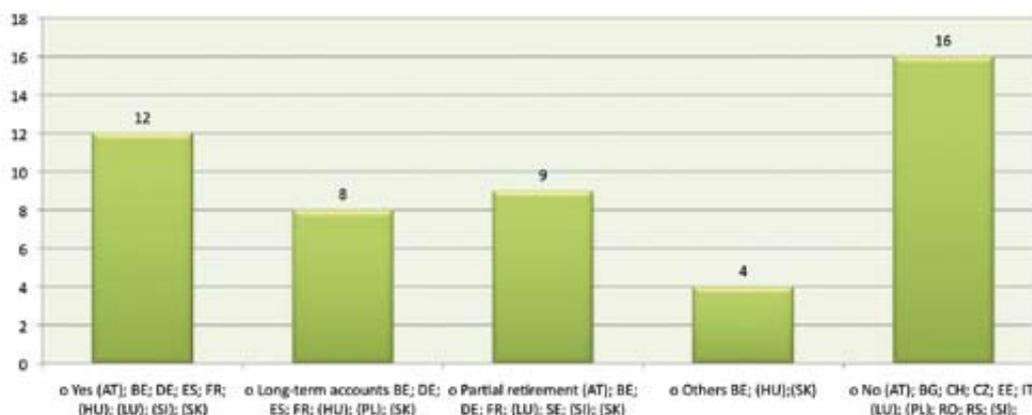
**4.5 Do older employees have the possibility to use different working time models?**



Twelve companies have introduced flexible working hours for older employees. In 4 of these companies flexitime opportunities form part of a social partner agreement. In 20 companies there is no, or little, flexibility in working hours.

#### 4) Employment Situation – Working Conditions

**4.6 Do different models or tools exist for planning staff requirements with regard to employees retiring against the backdrop of demographic change?**

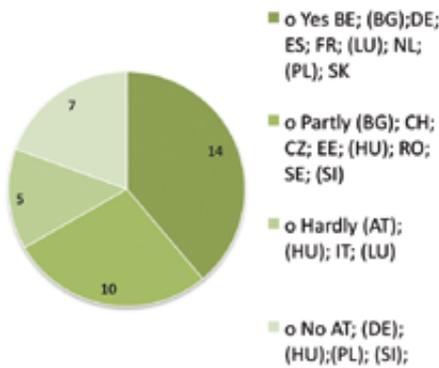


Twelve companies report using instruments designed to influence staff requirements arising from employees retiring. Two common instruments are long-term accounts or part-time schemes for older employees. The following strategies were also mentioned: partner-

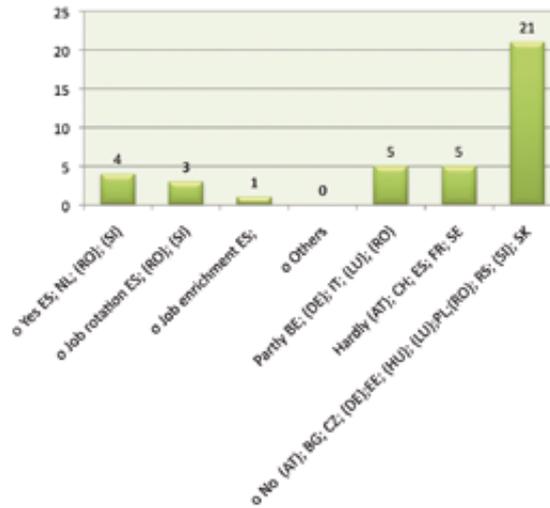
ships with business colleges, career programmes to foster managerial staff, social compensation, and plans to hire new staff due to liquidation of bank holidays and other days off in different staff categories.

4) Employment Situation – Working Conditions

4.7 Does your company implement measures to adapt workplaces/jobs that are under high physical or psychological stress?



4.8 Does your company operate programmes to redeploy employees inline with their age?



The diagram on the left shows that in 24 cases measures can be taken to improve, to a greater or lesser extent, work environments/ conditions that are psychologically or physically stressful. In the view of 13 participants there is little or no possibility of achieving this. Measures are:

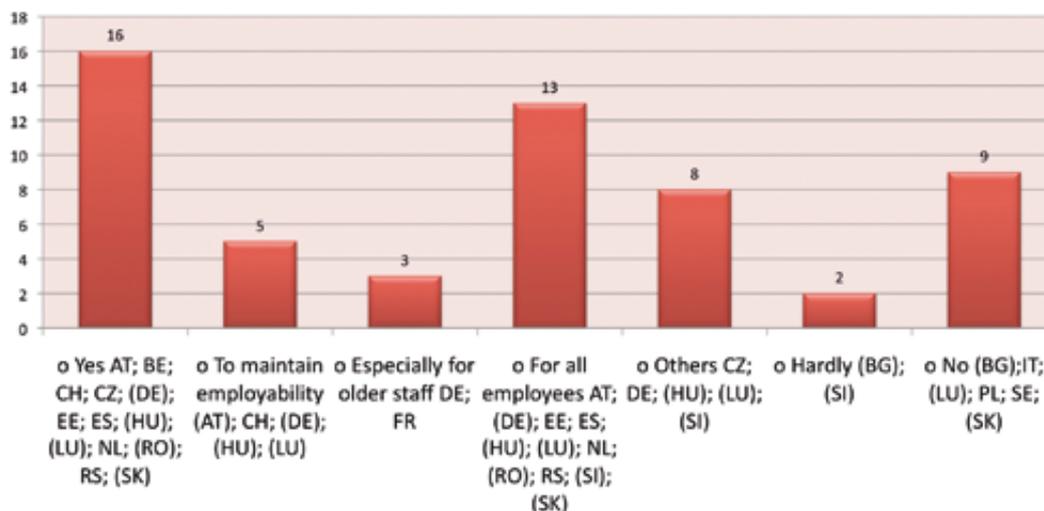
- Ergonomic measures and mechanisation
- Psychological support to relieve stress and resolve conflicts
- Psychological help following accidents or physical assaults
- Coaching in how to communicate with customers
- Additional leave or days off
- Special account taken of employees’ physical discomfort

The diagram on the right, however, shows that shifting an older employee to another function/workplace is very rarely an option. Twelve respondents said it was hardly ever possible or never possible in their companies. In the 4 cases where it was possible the measures involved job rotation or job enrichment.

From the previous 6 diagrams it is evident that older employees seldom receive special treatment.

#### 4) Employment Situation – Health Promotion

**4.9 Does your company implement specific health promotion measures (beyond statutory provisions on health and safety at work)?**



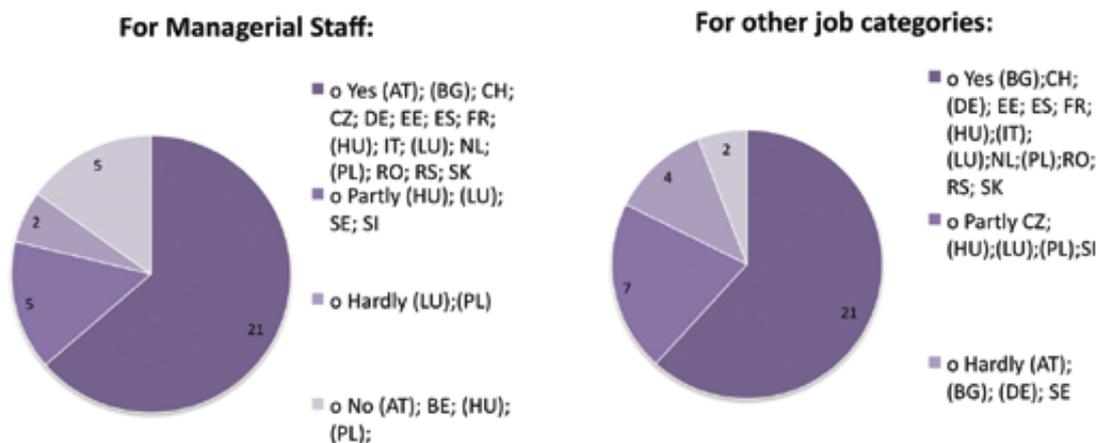
This diagram depicts the responses given to the question relating to measures taken which go beyond the minimum legal health and safety requirements. Sixteen companies said that their measures exceed statutory stipulations. In a few cases these are specially

aimed at improving the lot of older workers. In most cases they apply to all staff.

In the 11 companies where no extra health promotion measures are taken it may still be the case that statutory provisions are sufficient to ensure fully adequate protection.

#### 4) Employment Situation – Training Measures

**4.10 Does your company assess training requirements with regard to maintaining employability on a regular basis?**

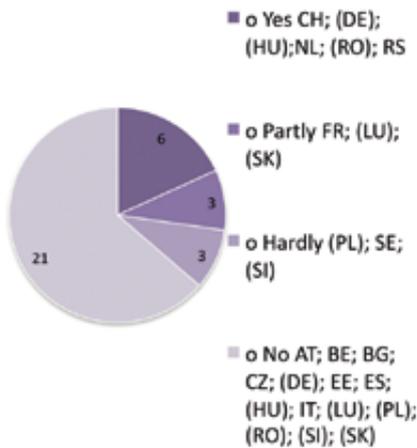


The third area of the survey looks at further-training measures that enhance the employability of workers. The enquiry into whether companies ascertain their own training requirements distinguished between the training needs of managerial staff and those of other job categories. 26 responses revealed that the companies look at training

requirements for their managerial staff; 27 responses looked at the needs of other employees. These figures are high. Other responses likewise reveal very little disparity in the treatment of managerial staff and other employees.

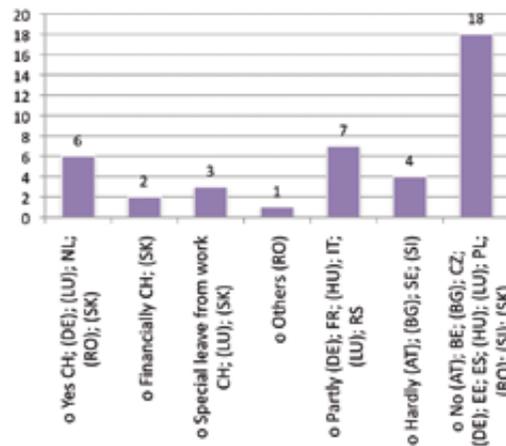
#### 4) Employment Situation – Training Measures

**4.11 Does your company plan life-stage or age specific career development in consultation with the employees?**



In contrast to the previous responses regarding research into training needs, it is not usual for employees and their superiors to discuss together the employee's career development. 24 out of 29 respondents said that this did not happen in their companies. With respect to support for further training, 22 participants say that

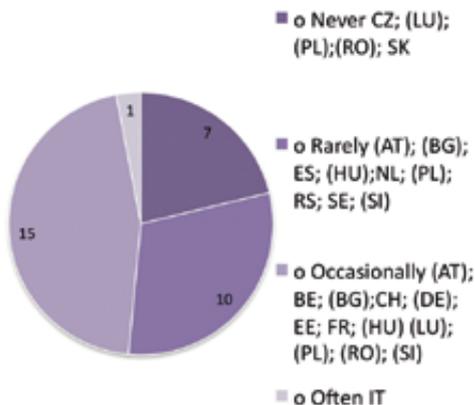
**4.12 Does your company support training schemes geared to the different life stages?**



their companies provide no support for the age-specific further training of their staff. This form of assistance is evident in only 6 companies. The question did not cover training measures undertaken to improve employees' performance within the company.

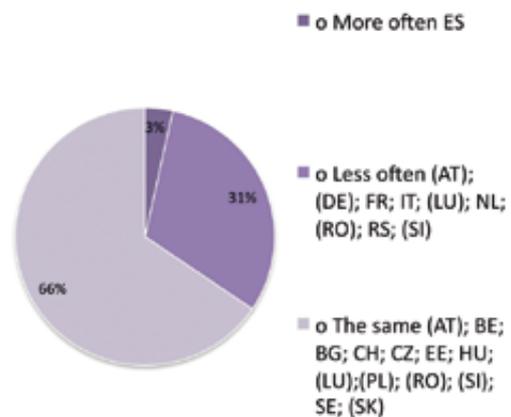
#### 4) Employment Situation – Training Measures

**4.15 Do employees attend training schemes that are not directly related to their job?**



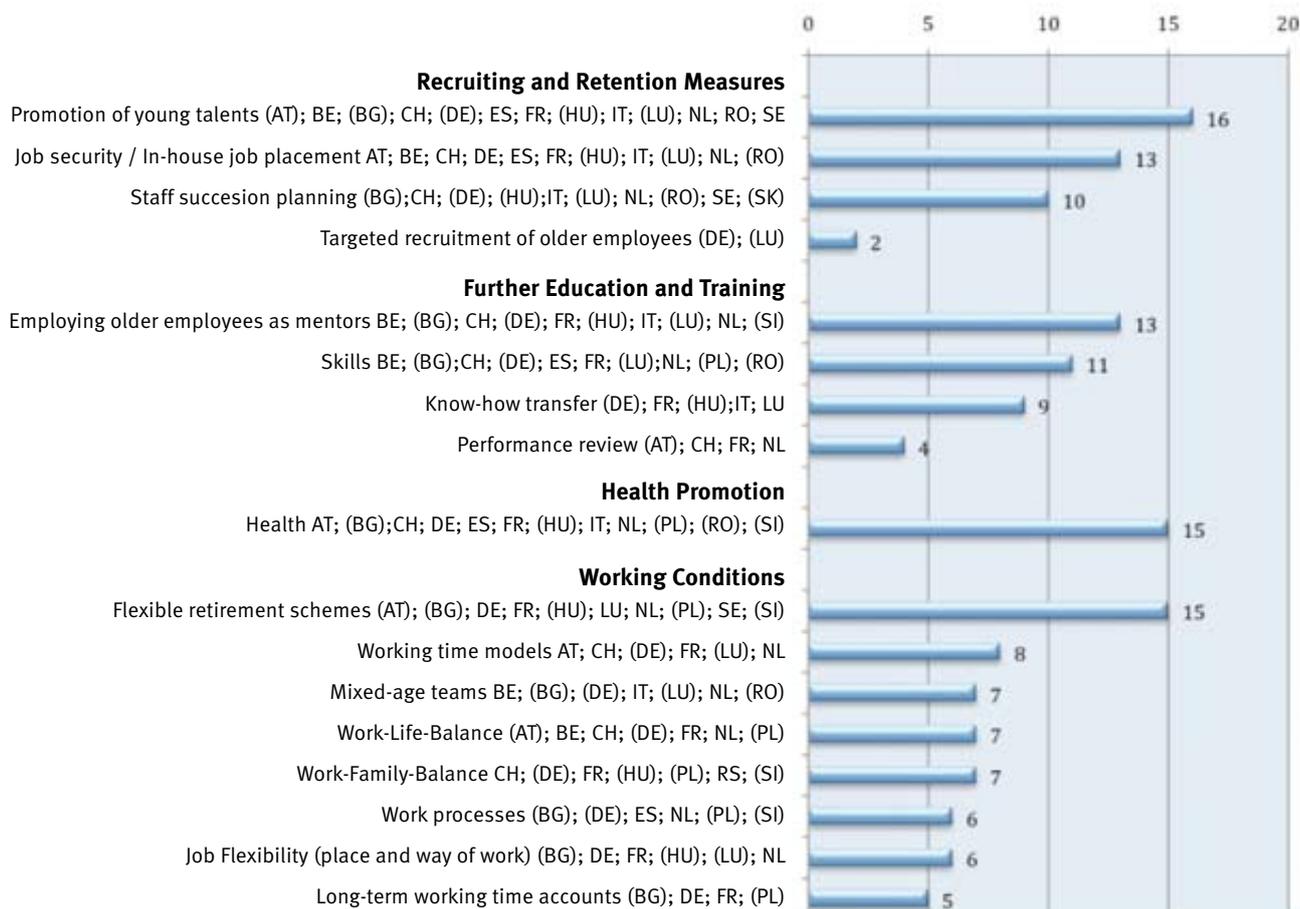
Two questions relating to course attendance rates round off this theme. Approx. half the respondents said that their companies' employees always or occasionally took part in further training modules that were not directly linked to their jobs. In the other half of the companies the employees never, or hardly ever, attended this kind of training module.

**4.17 Do older employees attend such training courses more frequently than younger employees?**



In approx. 2/3 of companies there is no disparity in training-course attendance along age lines. One third of companies did say that their older employees were less liable to take part in further-training courses. In only one country did older employees attend such courses more often than their younger counterparts.

#### 4) Employment Situation – Company Measures



Respondents mentioned projects and initiatives in almost all proposed areas. The most common references were to:

- Mentoring programmes
- Fostering of new, entry-level employees
- Work-family balance
- Health
- Training measures
- In-house help in securing positions
- Procedures relating to successors; know-how transfer
- Flexible procedures relating to retirement

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