



**Expert Group European Health Workforce
17 March 2016
Brussels**

Session “R&R of Health Professionals in Europe”

A social partner-based solution to the challenges of an ageing workforce in health care: Collective agreement “Long-term Accounts and Demography” (2014ff) for the University Hospitals in Baden-Württemberg

Mathias MAUCHER, Policy Officer “Health and Social Services”, EPSU

"Ageing Workforce": Background + Making the Business Case for Investments + Perspectives

- **Background**
 - Health care workforce challenges, i.a. ageing workforce
 - Ageing population, chronic diseases, multi-morbidity
 - EU agenda
- **Making the business case => Valuing older workers**
 - Reducing expenditure on agency workers
 - Reducing turnover, replacement costs, loss of experience
 - Burnout, patient and customer satisfaction, quality of care and organisational performance
- **Perspectives for 2016 and beyond**
 - Negotiations of cross-sectoral social partners on agreement on active ageing and intergenerational solidarity (kick-off meeting: February 2016)
 - Presentation of H/HCS guidelines at fact-finding seminar
 - Taking up of earlier work on topic in context of EU-OSHA HWC "Healthy Workplaces for All Ages" (2016-2017)

- **EPSU-HOSPEEM Framework of Actions „Recruitment and Retention“** (17 December 2010)
Final version in 11 languages [www.epsu.org/a/7410]
=> Key issues covered: 1) work organisation; 2) workforce planning; 3) diversity and gender equality; 4) professional training/CPD; 5) OSH
- **EPSU-HOSPEEM Guidance on addressing challenges of an ageing workforce in the health sector** (11 December 2013)
Final version [EN + FR + DE + ES] [<http://www.epsu.org/a/10056>]
(+ EPSU Position Paper “Ageing Workforce” (May 2012) [EN + FR + DE] [<http://www.epsu.org/a/9116>])
- **Project “Ageing Workforce in Hospitals”** (EPSU affiliates from D, GB, H, NL and SRB + partial involvement of employers’ associations from D, GB and NL)
Final Report: Good Practice Examples (covered: D, GB, NL; no examples for H and SRB) & Recommendations
Presentation: 10 December 2015; Final version [EN + DE]: January 2016
- **Report on the use of the EPSU-HOSPEEM Framework of Actions “Recruitment and Retention”** (10 December 2015) => Good practice examples on topic “ageing workforce”
Final version [EN]: February 2016 [<http://www.epsu.org/a11944>]

SSDC Hospital/Health Care Sector GUIDELINES AGEING WORKFORCE (2)

- **6 Chapters**

- Age management policy
- Flexible work
- Talent management/lifelong learning
- Health and safety at work
- Workforce planning
- Preparing for retirement

- **Principles**

- No “one size fits all” guidelines, adaption to concrete workplace situation
- Whole workforce approach (not only starting with workers 55+)
- Starting from risk assessment and workforce analysis
- Building on EU legislation on “non discrimination” and on “health and safety” at the workplace (also referred to in document)

- **Contexts (in the SSDC HS) supportive of elaboration of document**
 - **Thematic focus 1: R&R** => EPSU-HOSPEEM Framework of Actions “Recruitment and Retention” (December 2010: <http://www.epsu.org/a/7158>) + DG SANCO/SANTE Study on Effective Recruitment and Retention Measures (2014/2015), i.a. with a case study and examples on the topic
 - **Thematic focus 2: OSH** => EC Strategic Framework for Health and Safety at the Workplace (2014-2020) + e.g. MSD & ageing workforce (2014-2016)
 - **Joint interest** in structured exchange of existing/good practice on this issue that started back in 2006 with a first exploratory study jointly commissioned
 - **Proposal by HOSPEEM** to include topic in work programme 2011-2013
- **Main contents**
 - **Introduction:** Reasons for taking this initiative; role of social partners in addressing the challenges of an ageing workforce in health care; evidence for positive effects of initiatives and investment by governments and employers; relevant EU-legislation to frame measures by social partners and national government: a) non-discrimination (1.4.1); b) OSH (1.4.2)
 - **Six chapters:** age management policy (2.1); flexible work (2.2); talent management/training (2.3); health and safety at work (2.4); workforce planning (2.5); preparing for retirement (2.6); conclusions (2.7)
 - **Follow-up obligations:** a) review of progress made with regard to the topic of ageing workforce + assessment of need of adaptation of document end of 2015; b) report end of 2017 on use of guidelines; c) annual updates
 - **Annex with examples of existing/good practice**

Examples from the UK (=> Annex to the Guidelines)

- RCN: Guidance on protecting employment for older nurses: “Who will care? Protection employment for older nurses”



- NHS Employers: “NHS Working Longer Review”





**Tarifvertrag
„Langzeitkonten und Demografie“ für die
Arbeitnehmerinnen und Arbeitnehmer der
Universitätsklinik Baden-Württemberg
(2014-2023)**

**Collective agreement
“Long-term Accounts and Demography” for
workers/employees of the University Hospitals
in Baden-Württemberg
(2014-2023)**

- Coverage: all workers of the University Hospitals in Baden-Württemberg; entitlement for workers with unlimited work contracts, option for fixed-term employees [§ 2 (2) 1] (Not covered: apprentices/trainees [German labour law = no employees]; workers of category “marginal employment”)

- Objectives:
 - ✓ Models of working hours flexibility and work organisation adapted to different ages and to an ageing workforce
 - ✓ Gradual transition into retirement
 - ✓ Access to professional qualifications (life-long learning)

- Entry into force on 01.01.14 (applies as of 01.09.15, ends on 31.12.23); signed after ~3 years of negotiations; revision clause on provisions of CA: after 2 years; negotiations for retirement arrangements after 2024: as of 2019

- Worker: demands employer for a long-term account and for a saving agreement; can transfer to account wage elements saved or working time saved (recalculated into a monetary counter-value) [§ 2 (3)] for use in the future [§ 2 (2)] and guaranteed by employer [§ 2 (2)]; commits to doing regular transfers
- Employer: advises on and sets up long-term account (only indicating monetary amounts) and signs savings agreement with insurance (beneficiary/entitled person = worker)
- Information and consultation [§ 3]: Employee is entitled to consultation with the employer and the administrator; receives list of required documents in support of application (e.g. pension insurance information)

- Administrator: 1) provides tool to calculate the time-value-account (*Zeitwertkonto*), i.e. monthly savings amount needed to obtain a certain number of months of time off work (max. 104 months), depending on model chosen:
A) 100% time off with I) 100% or with II) 70% of last wage;
B) 50% time off with supplement of 20% of last wage;
2) is available for consultation on insurance products, etc.
- "Guarantor" (= private insurance): concludes insurance contract with employers (insured person = employee)
- Trustee: monitors and releases money or working time saved (always recalculated into a monetary counter-value)
- Participation rights of the works council (*Betriebsrat*)

- Arrangement to build up time-value-account
 - ✓ Requirement of regular (monthly or annual) transfers to account (min 50 €/month or 300 €/year)
 - ✓ One-time off payments in addition possible
 - ✓ Input of saved working time possible
 - ✓ Definitions of amounts for min 1 year

- Possibilities to use time off work (exhaustive list of options), with a minimum duration of 1 month :
 - ✓ Part-time work in the years before legal retirement (gradual transition to retirement)
 - ✓ Early retirement (full exemption from work obligation)
 - ✓ Family care, parental leave (also part-time)
 - ✓ Qualification, training, re-training (also part-time)
 - ✓ Sabbatical (3 to 6 months), with employers' consent

Options for use of time off work (b)

Care of family members

Further Qualification
(Life-Long Learning)



Sabbatical

Taking care of own
children

Working time reduction (down to 0%)
prior to retirement

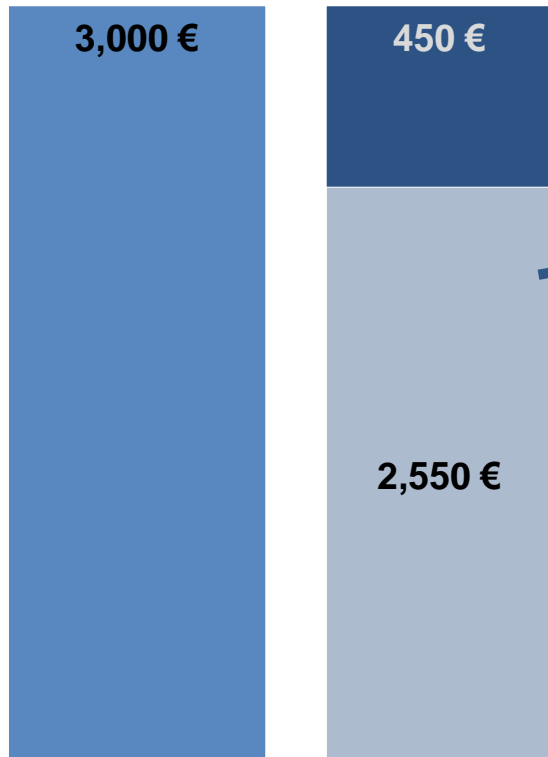
- Deadline: depending on period fixed in labour law or in collective agreement, otherwise min 6 months before time off
- Duration and start of time off have to take into account the organisational requirements of institution of employment
- Rejection of demand possible for organisational reasons in case of block exemption before taking early retirement
- Other issues: Rejection of demand for time off possible for indispensable organisational reasons (as fixed in labour law)
- Consent required in case of demand for sabbatical
- Double flexibility => Partial time off and/or partial payment

Wage levels during time off – Options to transfer time-value-accounts

- During time off: fixed monthly salary ($> 70\%$ or $\leq 130\%$ of the average monthly gross earnings for the previous 12 calendar months, e.g. min 1,890 € and max 3,510 € in case of a gross salary amounting to 2,700 € after 10 % savings)
- During time-off phase no entitlement to supplement payments to wage or special bonuses [§ 11 (3)]
- When changing employers value assets can be transferred to new employers (also in other economic sectors, e.g. in postal services) in case a similar arrangement exists
- Assets saved on time-value-accounts can be transferred to the worker's individual account in the Statutory Pension Insurance Scheme (*Gesetzliche Rentenversicherung/GRV*)

- Initial funding (start capital) from employers for all 4 university hospitals about 3.7 million €; from April 2014 onwards fixed amount to be contributed by employers, as set in the collective wage agreements
- Payment commitments from Demography Fund depend on amounts of savings available/built up
- Demography Commission – 3 members each to represent the employer and trade union/ver.di – 1) to control inflows into the Fund, 2) to decide about withdrawals and 3) to set the criteria to select the demands for time off in case the applications submitted exceed the amounts available in the Fund
- Commitment by employers to negotiations for workers entitled to taking retirement in 10 years (i.e. as of 01.04.24)

Demography Fund (2): “Fast runners”



→ Maximum amount to be paid by employer into Fund: 18,000 €



Demography Fund



Long-term account

Special category 1: Workers/employees close to retirement (in max 4 years)

- Workers close to retirement [= 4 years or below prior to statutory pension age] (i.e. retirement by 01.04.18 at the latest) receive a subsidy amounting to 14,000 € to 18,000 €
- Reduced financial assistance for part-time workers
- Pay level during time off: > 70 % or <= 100 %
- Minimum savings contribution: 10 % to 25 % – depending on the workers' wage group – of the average monthly earnings for the previous 12 calendar months (as fixed by legislation for contracts subject to social insurance contributions) (*sozialversicherungspflichtiges Arbeitsentgelt*)

Special Category 2: Workers/employees nearing retirement (in 4 to 10 years)

- Workers nearing retirement [= being entitled to retire in 4 to 10 years, i.e. between 01.05.18 and 01.04.24] receive a monthly payment of 500 € for a maximum of 2 years

- Conditions:
 - ✓ At least 70 percent of the amount entitling for time off has to be already saved by worker
 - ✓ Time off from work before retirement for at least 6 months
 - ✓ Application for time off from work to be submitted between 1 January and 31 March of pre-previous year before worker wants to take retirement
 - ✓ At date of application for time off at least 6 years of prior employment period