

Active Ageing
through Social Partnership
and Industrial Relations in Europe
Workshop evidence report

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Active Ageing through Social Partnership and Industrial Relations in Europe (ASPIRE)

The Empirical Evidence in Detail

1. Introduction

Active Ageing through Social Partnership and Industrial Relations in Europe (ASPIRE) is a project undertaken by Newcastle University / the Centre for Research into the Older Workforce (CROW), ADAPT (Italy) and the universities of Granada (Spain) and Lodz (Poland). The empirical evidence set out in detail in this report is summarised and commented upon separately in a shorter report for the reader who seeks a quicker overview of our project's findings, "Active Ageing through Social Partnership and Industrial Relations in Europe: Workshop Findings" ("the summary report"). A brief "Executive Summary" of the research is also available. The present report goes into more detail than the two above mentioned and draws together more of the qualitative evidence. Individual country reports, both of desk based research and empirical evidence, are available on the project's website and should be referred to for a comprehensive understanding of the project's principal conclusions. For the avoidance of repetition we will not provide the background introduction, summary of desk based research and other such sections in the present report as all this has been set out in detail in the summary report.

2. Aims of the ASPIRE project

For clarity, the aims of the ASPIRE project were clearly set out in the formal application to the European Commission *Directorate General for Employment Social Affairs and Inclusion* in July 2016¹. The application set its aims as follows:

"... to understand processes through which social partners develop, pilot and implement active ageing interventions (including collective agreements) and reorient away from a collusion toward early retirement. European social partners have developed programmes to support older workers delay retirement including for example the Working Longer Review of the UK National Health Service and our aim is to understand how Industrial Relations (IR) systems can facilitate and/or inhibit such agreements."

The summary report provides more detail on the policy context in which this research aim is set, including details of the ["European Social Partners' Framework Agreement on Active Ageing and an Intergenerational Approach,"](#) finalised on the 8th March 2017 (*after* the commencement of the project). As explained in the summary report, references to, "...tools and

¹ Under the European Commission DG Social Affairs and Inclusion funding call, "Improving Industrial Relations," (VP/2016/004)

measures” to be taken into account by HR managers and social partners, “in the context of national demographic and labour market realities...” made in the above framework agreement, provide a timely and relevant backdrop setting for our research. The agreement, among other things, notes that, “measures need to be implemented...at national, sectoral and/or company levels, to make it easier for older workers to actively participate and stay in the labour market until the legal retirement age...” The ASPIRE project was actually approved before the signing of the framework agreement, but had this not been the case, it is conceivable that such a project might have been devised anyway to compliment the overarching purpose of the agreement.

3. Methodology

In order to facilitate an objective and consistent over-view of the empirical evidence in the form of workshops and interviews from the four participant countries, a structured questionnaire was produced to which researchers in each country were invited to respond. This was primarily to encourage a full record of workshop and interview evidence and crucially, to capture the impressions gained by insightful consideration of the workshops and interviews. The questionnaire was drafted after examining the national evidence reports from each of the four countries for similarities and common threads (or contrasts). It was hoped that these could be confirmed or refuted and better understood by a closer inspection of the evidence. The following sections will therefore bring together the observations of researchers (based on their sense of the qualitative evidence) supported by direct quotations made by workshop participants. To facilitate better understanding of our subject matter and the reasons for some of the questions, some explanation of the policy context will be provided section by section.

4. Awareness of active ageing

The World Health Organisation definition of active ageing refers to it as, “the process of optimizing opportunities for health, participation and security in order to enhance quality of life as people age.” Walker defines it as, “A comprehensive strategy to maximise participation and well-being as people age (which) should operate simultaneously at the individual (lifestyle), organizational (management) and societal (policy) levels at all stages of the life course”. Researchers were asked: “How strongly would you rate the level of awareness of active ageing among the attendees of workshops and interviewees from your country?” The following assessments were made:

Table 1: Levels of Awareness of Workshop Participants of Active Ageing (Assessments by researchers based on participants' contributions in their workshops)

	High awareness	Modest awareness	Very little awareness	No awareness
Italy		X		
Poland		X	X	
Spain			X	
UK		X		

Overall, in all countries, the workshop participants demonstrated “modest” or “very little awareness” of the concept of “active ageing.” Nevertheless, in a looser, less coherent way, there was a degree of awareness of the challenges facing older people as they remained in the workforce and the fact that active ageing *per se* was not being addressed, as the following comments illustrate:

Spain: Trade Union rep, private sector, individual interview: *“It is not a daily issue neither in companies nor in the sector where I work”.*

Human resources manager, public sector, workshop *“... I have been in this company just a few months but I have worked in other companies, in other groups. Unlike awareness of other groups, I perceive that there is no special sensitivity around active ageing. This concerns me because the average age of the workforce in the company is already rising”.*

Italy: Our Italian researcher commented that, *“Many people interviewed and involved in the workshops seemed generally enthusiastic about active ageing. Others were less confident and somehow uncertain about existing active ageing policies. The overall impression was that, although the promotion of active ageing is not among the priorities of social partners in Italy, the issue is starting to be considered following some pressures from their members (both workers and companies). Social partners recognise that active ageing is an issue of considerable concern, but it needs time to go on top of their agendas. This is also why active ageing measures in collective agreements are still scarce.”*

This ambivalence and incipient awareness is reflected in the following comments from workshop participants:

Employer Rep (Rome): *“Unions agents or workers representatives often are not aware of challenges and opportunities of an ageing workforce, or they tend to see them as secondary....Our association is not fully aware that single policies on working time flexibility or health assistance can be associated with a broader active ageing policy”.*

Poland: Researcher's observation: *"I noticed low awareness. Workshop participants declared that they knew (about active ageing), but as the discussion went on, they could not give details. Trade union organizations at the central / national level are familiar with the topic. On the other hand, trade union and company committees have very little awareness of the issues involved."*

Trade union rep, (union workshop 2): *"This is my first encounter with the term 'active aging in the workplace.' ...Where does the term come from? What do the social partners do at work? Do they have to force the employer to work out a network of employment based on age and experience of employees? Do you introduce such activities (both in the workplace and outside), so that age does not determine the suitability of the employee?"*

UK: Attendees (both management and unions) were acutely aware that more people were working later, that they now have the option of working beyond 65 without being obliged to retire and that the architecture of both state and occupational pensions provision was shifting so that they would be *expected* to work longer before retirement. There was strong awareness too of the challenges of remaining healthy in order to remain economically active.

Rep (NHS, Local Government and not for profit sector): *"...you know, we can't physically do it until we're 60, because it's so demanding... it is back-breaking."*

Rep (Construction sector): *"It's a physical job. As long as you've got your health and your wellbeing, you can go on working. And a lot of them are not. They've been working, they've got arthritis and they have to work all weathers, carrying heavy loads, and their bodies are not in the shape to work."*

5. Awareness of framework agreement

Framework agreement (opening paragraph): "... measures need to be implemented, where necessary at national, sectoral and/or company levels, to make it easier for older workers to actively participate and stay in the labour market until the legal retirement age," and further comments..:

"Measures should be aimed at significantly improving the ability of workers of all ages to stay in the labour market, healthy and active until the legal retirement age, as well as strengthening a culture of responsibility, commitment, respect and dignity in all workplaces where all workers are valued as important irrespective of age."

The relevance of the framework agreement may be readily understood from the above quotation. Our workshops showed there is a lack awareness of it and therefore a lack of understanding of the agreement's potential benefits. The following table reflects the assessments of our researchers of their workshop participants' levels of awareness of active ageing.

Table 2: Participants' Awareness of Framework Agreement (Assessments by researchers based on contributions in their workshops)

	High awareness	Modest awareness	Very little awareness	No awareness
Italy				X
Poland			X	
Spain				X
UK				X

Comments and quotes from individual countries:

Spain: Workshop facilitator: *“Do you know other policies? For example, in March 2017 there was a European Agreement between unions and employers.”*

Answer: *“In our company this has not been applied”* (trade unionist, public sector, workshop).

(Throughout all four Spanish workshops nobody mentioned the framework agreement.)

Italy: The issue of the framework agreement was not discussed.

Poland: The participants of the workshops usually did not know about this initiative at all. The exception was the national committee of the union Solidarity, which organized a dissemination seminar for its members in April 2018. Members of other unions as well as employers' organisations and policy makers were all invited to take part. Attendees included national and foreign experts from countries representing different systems of social policy and different cultural contexts as well as trade unions, employers' organisations and representatives of company committees from across Poland. The meeting included short presentations and longer discussions and allowed an exchange of experience and good practices as well as active participation by attendees. In this way conversations were able to consider the broader context.

UK: Workshop facilitator's comment: One may gauge the lack of awareness of the framework agreement, by the failure of participants to mention it when it would have provided a useful supporting argument to their case. The ideas it contained received no acknowledgement from union reps or employers, even though their discourse was often entirely in line with the agreement, as is illustrated in the following workshop quotation.

Rep (Construction workshop): *“At the end of the day, it is a physical job, even for fit, young men. I know when I was grafting, you came home whacked, do you know what I mean? God knows what it's like, you know, add 20 years on me or 15 years on me. I'd be proper struggling. That is the main issue. And it's a case of, from what I can gather, I might be wrong,*

they're not going to reduce the workload, I don't think... They might try and give them easier jobs, but the work is the work and that's what they expect. So, it is going to be an issue, going forward, your age."

6. Perceptions of active ageing as a long term issue

Our researchers were in agreement that participants saw active ageing as a long term issue, as is reflected in the following table:

Table 3: Did Participants See Active Ageing as a Long Term Process? (Assessments by researchers based on participants' contributions in their workshops)

	Agree – active ageing a long term issue	Disagree – active aging short term
Italy	X	
Poland	X	
Spain	X But not always	
UK	X	

Comments on perceived long term nature of active ageing:

Spain: Facilitator's comment: Active ageing is generally but not always seen as a long term issue.

Union rep (public sector workshop) *"... active ageing has not been dealt with until now but we have to focus on it in the long term because, as I say, the staff is now around 45-50 years old"*.

Manager, private sector, workshop: *"And as for the issue of age and workers, it is true that it is not an issue that now concerns us much today, but we have in the agenda that we have to see how we are going to do it because right now our the company's personnel is very young but yes it is true that in the short term we are going to find already with people of an age close to retirement"*.

Italy: As will be considered later, responses to the EU policy call for social activation policies in Italy, had taken the form of sector level Intergenerational Solidarity Pacts. It is not immediately obvious that in the application of these pacts, a longer time perspective is adopted either with regard to ageing *per se* or measures to promote *active* ageing.

Comment from Italian partner: *"A union representative argued that problems linked to active ageing must be addressed in a broader discourse of a new social contract that fits for all. The importance to understand active ageing as a life-long learning process was also emphasized."*

Poland: Our Polish workshops focused more on the policy level interventions that would be necessary to make “active ageing” a reality, than on the behaviours and life course concepts required to make sense of the ambition to age actively at an individual level. They addressed the issue, less in terms of the specific life style, work and career changes which “active ageing” demands of individuals over a life course and more in terms the national policy changes required for employers and the state to facilitate change.

Employer Rep (workshop 4): *“There would be a need for such actions... say in national programs. (They might include) incentives for employers, let's say, by law. By some higher-order regulation so that the employer would be encouraged.”*

Another saw the route to achievement of active ageing by offering employers *incentives*, through tax allowances or grants, to encourage the adoption of age friendly measures.

Employer representative: *“He would need to have some form of relief ..., or any support, or lowering of some employment taxes, or any additional grants so that the employer ... does not ‘get rid of’ older workers. That offer some encouragement to employers. It would be seen as a benefit. It would also be helpful to show good examples of [actions by other employers] not only in this country, but also abroad. All of this would help to promote dialogue on active ageing and share good practices”.*

A trade union rep commented that National and Provincial Social Dialogue Councils could encourage social dialogue on active ageing.

Trade Union Representative (Workshop 4): *“The national and provincial councils of social dialogue are of a great worth. Their value would have to be expanded downwards. Dialogue, should develop at the level of counties and disseminate down to the level of municipalities. We should create a certain extensive structure that will facilitate the implementation of specialized solutions. This approach may even be an incentive, since formally in the [legislation establishing the] Councils of Social Dialogue, nothing is forbidden. We will probably reach this point ... I have already had meetings with Olsztyn District Office encouraging people to think about creating such a thing.”*

UK: There was widespread agreement among the union reps and attendees in the management workshops, that the achievement of active ageing was a long term issue. This emerged with respect to the physical health aspect of ageing and also with regard to coping with pressure in the job and being allowed opportunities to retrain, or for the job tasks to be adapted in some way to adjust to the abilities and limitation of an older worker.

Union rep (aged 50, bricklayer): *“Personally, I’ve got severe back problems. I’ve got two vertebrae starting to crumble, third one is starting to crumble. I’ve got scar tissue across my back, sciatica and recently, last week, I found out I’ve got some arthritis in the bottom of my*

back as well, all due to the damage done when I was 17. Also, I think you've got the health side of things as well, the ageing workforce, where diseases come through. Occupational diseases like silicosis, asbestosis, stuff like that. All that stuff develops later on in life. I know one asbestos fibre lays dormant for 40 years in your lungs before it affects you."

7. Early retirement cultures

It should be pointed out that a key element in developing policy around active ageing and extending working life has been mounting evidence of populations in some countries, appearing to widely *expect* options to quit the workforce early on early retirement schemes of one kind or another. The following tables set out the background facts of early quitting behaviours in the four partner countries.

Table 4: Employment Rates of Workers Aged 55-59, 60-64, 65-69 in 2016 (Source: OECD *Pensions at a Glance 2017*)

	55-59	60-64	65-69
Spain	59.3	36.8	5.3
Italy	62.2	36.9	9.1
Poland	61.7	30.5	9.9
United Kingdom	73.4	52.2	21.0
OECD	69.6	46.3	20.9

Table 4 provides details of employment rates of workers in the three age cohorts shown, in 2016. Table 5 compares the effective retirement ages to be found in our partner countries.

Table 5: Effective Retirement Ages and Normal Pensionable Ages for Men and Women in Partner Countries 2016 (Source: *OECD Pensions at a Glance 2017*)

	Men		Women	
	Effective	Normal	Effective	Normal
Spain	62.2	65	62.6	65
Italy	62.1	66.6	61.3	65.6
Poland	62.6	66	59.8	61.0
United Kingdom	64.6	65	63.2	63

As may be seen, there is an increasing difference between the employment rates of the four countries according to age cohorts 55-59, 60-64 and 65-69, with the 60-64 employment rate of Spain and Italy being below 37 per cent compared with the OECD average of 46.3 per cent and 52.2 per cent in the United Kingdom. (The Polish 60-64 rate of 30.5 per cent should be read advisedly, with the knowledge that early retirement is frequently followed up by "de-retirement" back into comparable work on a self-employed basis, and therefore probably understates the true level of activity among older workers in this age cohort.) In Spain, Italy and Poland there is a gap of 4.5 to 3.4 years between male "normal" retirement and

“effective” retirement, which is to say that men retire earlier than the normal retirement ages by these amounts on average. Women retire at (again) below normal retirement ages in Spain, Italy and Poland. In contrast men retire on average 0.6 years before normal retirement age in the UK while women now retire on average 0.2 years after their “normal” retirement ages. These facts provide a context in which responses to our next question on “early retirement cultures” can be seen to be corroborated by the data, as shown in table 6.

Table 6: Were employees and managements influenced by a prevailing “early retirement” culture? (Assessments by researchers based on participants’ contributions in their workshops)

	Signs that an “early retirement culture” prevails	No signs of an “early retirement culture”	A mixed picture – Some signs of “early retirement culture” but also the contrary
Italy	X		
Poland	X		
Spain	X		
UK			X

Comments and observations on “early retirement culture:”

Spain: Line manager (private sector, workshop) *“So far we have perceived or we have looked for ways to make someone leave the workplace before retirement. This doesn’t show an understanding of active ageing, but it just goes in the opposite direction”.*

Worker (private sector workshop): *“The issue of age, especially here in our company, to tell the truth, everyone is dying to be 65 years old, or even 60, and leave. Since I’ve been here I have been thinking how much time do I have ahead to leave, I’m looking forward to leaving”.*

Union rep (public sector workshop): *“So we in our company have never put retirement on the table, only to take workers out of the way via early retirement and bring in new people, who also mean a much smaller economic burden to the company and that is also an added value”.*

Italy: Union Rep (Modena Workshop): *“The banking sector, as part of the tertiary sector, is being particularly affected by digitalization that implies the bank’s restructuring and a higher number of redundancies. This phenomenon has been historically managed (in the last 15 year) by facilitating access to early retirement though sectorial funds, entirely funded by the companies of the sector”*

Employers’ rep (Rome Workshop 3) *“If legislation allows early retirement, companies will prefer to favour the exit of older workers that represent an important burden from the economic*

point of view, and hiring young workers by using economic incentives, without taking into the consideration the problem of welfare systems' sustainability."

Poland: Facilitator's comment: *"I confirm strongly the existence of a retirement culture. Pension entitlements cause people to leave their jobs as early as possible. Gaining retirement rights means everyone using them. The system is not stable at all (it has been changing a couple of times since the beginning of socio-economic transformation in the 90s) this way if someone can use their given provision even though it is low they just do it. This early retirement culture has been fixed by units driven by stereotypes (like company owners and managers) which apparently do not realize the benefits of employing the older person."*

UK: The discussions in the UK workshops gave the sense that there is not now an "early retirement culture" in the way implied (i.e. of widespread expectations of early quitting supported by early pensions.)

Union rep, financial services workshop: *"You've got the older generation who's been there possibly 20 or 30 years, and within the company...who have come past general retirement age...but their circumstances may be that they're on their own now. They don't have any family, so they come to work part time, because there are **people** at work. ...They come into work because they speak to people, they see people, it's social...they're coming to work for their own reasons."*

Comment: In other words, there is a marked difference between the situations in the four countries, with the UK least prone to the pressures of early quitting via "early retirement cultures," and Spain the most vulnerable to this kind of cultural / attitudinal influence. Comments from the workshops in each of the countries hint at underlying narratives which might well serve to explain the durability of these attitudes. While such early retirement cultural influences persist, they do not do so "across the board" in all countries, a fact which may at least in part, be explained by pensions and other elements of social policy and in turn contribute towards a collective attitude base in which societal wide empathy with the idea of active ageing is fostered or inhibited.

8. The Industrial Relations Systems and Active Ageing Discourse

In all of our partner countries, the systems of industrial relations and labour law supported and shaped the character of social dialogue. Key elements in the extent of national and local coverage and quality of social dialogue are captured in the following comments and quotations;

Spain: flexibility in collective bargaining system has brought about patchier social dialogue.

Union rep (Public sector, interview): *"Well look, at this moment I think the problem people who have to negotiate have is, firstly, that employers do not have a unanimous position*

when facing collective bargaining because everyone has his own interests; secondly, I see that workers as a collectivity, given the high instability of the labour market (except for governmental officials) do not have either the feeling that they should stand as one at the time of negotiation. Then, and I say it from the point of view of the worker, the negotiation range is very small ... the issues that one can only put on the table have just to do with asking for a minimum wage recovery and certain stability in employment”

Italy: Our Italian partner commented, *“When it comes to unions’ power, company size matters, as the divide between SMEs and big companies affects trade union representativeness and undermines the logic of collective action. Small companies are difficult to unionize and human resource management approaches dominate industrial relations and undermine collectivity. Many trade unions’ rights and prerogatives do not apply in companies with less than 15 employees.”*

Poland: Our Polish partner reports as follows: *“The shape of industrial relations in Poland has been influenced by the country’s turbulent history including its relations with neighbouring countries: Germany, Russia and Austria. The years of socio-economic transformation had a major impact, particularly as the trade unions played an important part in building a democratic, free market Poland. This history served to establish the political influence of the unions, though their representativeness in Polish workplaces is much less developed.”*

Facts and comment: The Council of Social Dialogue in Poland is the key platform for dialogue between employers and trade unions. The goals of the Council include creating the conditions for social-economic development through a collaborative approach. It fosters social cohesion and strives to increase the competitiveness of the Polish economy; building social solidarity in employment relations; supporting and feeding into social-economic policy through dialogue between employees, employers and government representatives; and finally, supporting the implementation of social dialogue at all levels of local authorities.

Only 5 per cent of adult Poles are members of unions - 11% of the employed population. Trade union membership is dominated by factory organizations. Most of the 12.9 thousand local trade union bodies fall under the three main trade union organisations: the Trade Unions Forum (NSZZ), "Solidarność" and the All-Poland Alliance of Trade Unions (OPZZ).

With regard to the active aging agenda, trade unions are more likely to defend retirement privileges than to promote employment for people aged 50+. Opinions of Polish workers of the role of unions seem divided. Older workers say that trade unions never or rarely deal with the issues of women and men over 50. Others are more likely to believe that unions are interested in these matters, defending older workers against lay-offs. In the SMEs only 11 per

cent of companies report some kind of employee representation and 8 per cent of respondents reported the presence of trade unions. SME employers who collaborate with unions claim that they have a harmonious relationship based on partnering principles².

UK:

Facts and comment: In the UK there are now 6.23 million trade union members – less than half of the number at the beginning of the 1980s decade. Membership is stronger in the public sector than the private sector. (Public sector, 3.56 million members; Private sector, 2.7 million members.) The influence of unions is ‘patchy’ as most bargaining and collective consultation is between unions and individual employers rather than through employers’ associations and industry level agreements. In large areas of employment there are no union agreements, though alternative means of collective consultation (e.g. through “staff forums”) may be established. These however, offer only some of the benefits of a formal social partnership arrangement.

Health and safety legislation which covers all workplaces, provides support for joint consultation machinery in the form of health and safety committees, so in this area at least, the lack of comprehensive union agreements may not entirely preclude an element of social dialogue. Our ASPIRE project employee / trade union oriented workshops were held with union reps who were able to benefit from social dialogue. Social dialogue specifically around the barriers and facilitators to active ageing did not appear to be commonplace but there were exceptions.

Background facts on retirement, demographics and active ageing

UK

Effective retirement ages fell from an average of 67.7 years (men) and 65.7 (women) in 1970 to 62.8 for men and 60.8 (women) by 1985. Average effective retirement ages then climbed back to 64.6 (men) and 63.2 (women) by 2016 (OECD Estimates).

Today, one in four women and one in six men who reach state pension age have not worked since they were at least 55. By this measure, “early retirement” is still very widespread. The reasons for early exit may involve unplanned or unexpected termination of employment, and a period of worklessness, which may in time come to be rationalised post facto as “retirement.”

60 per cent of people retiring in 2017 were planning to retire before reaching state pension age. (Prudential Survey).

² Wiktorowicz, Warwas, 2017

Poland

Half of women and one third of men between 45 and 69 in Poland are economically inactive. Of those currently employed more than a half plan to retire as soon as possible.³ Since Poland's accession to the European Union in 2004, significant numbers have emigrated, mainly to the United Kingdom and the Republic of Ireland, in search of greater financial security.

In 2017 the Polish right wing Law and Justice Party lowered the retirement age to 60 for women and 65 for men, reversing an earlier increase in 2012 to 67 for both men and women. Even without the lower retirement age the working age population in Poland would sharply decrease in the long term (by over four million people before 2050, i.e. almost 20 per cent). Lowering the retirement age will accelerate this decline up to over six million people in the same period – almost 30 per cent of the working population.

Total fertility rates have declined from 3.7 children per woman in the 1950s to an estimated 1.32 children per woman in 2014, well under the population replacement rate of 2 children per woman. These demographic trends suggest major changes to Poland's socioeconomic structure. At the end of 2013 Poland had a population of 38.5 million individuals, of whom 48% were men and 52% were women. However, it is projected that the population will decrease to 32 million by 2050.

Italy

Since 1950, the proportion of the Italian population over retirement age has more than doubled. Birth rates are low and life expectancy is going up. Currently, Italy has one of the highest old-age dependency ratios in the EU-27. With low fertility rates and anticipated high life expectancy, the old-age dependency ratio could rise to almost two-thirds (two people aged 65 for every three of working age). Therefore, there is significant scope for increasing labour force participation of disadvantaged groups, particularly of older people. The employment rate of people aged between 55 and 64 years rose from 30.6 per cent in 2004 to 48.2 per cent in 2015 (59.3 per cent men; 37.9 per cent women), while their inactivity rate dropped from 68.1 per cent to 48.9 per cent. By 2030 it is expected that older workers will comprise nearly 25 per cent of the workforce.

Spain

People are retiring earlier - real mean retirement age in 2016 was 0.2 years less than in 2013. Average actual retirement ages in 2016 were 64.6 (women) 63.9 (men). In 2013, 38 per cent of eligible workers took early retirement; by 2016 this had increased to 44.62 per cent.

A 2013 law on Active Ageing allows for early retirement, under "exceptional conditions." Conditions include involuntary redundancy within four years of normal retirement, or voluntary early retirement when the individual is within two years of normal retirement age (65).

To qualify in either case, the individual must have made sufficient social security contributions (35 years for voluntary ER, 33 years for involuntary redundancy ER).

³ Kryńska *at al*, *Diagnosis...*, 2013)

A recent COST Action report concluded that in Spain early exit is seen as more appropriate for women than for men and women are more likely to approve of men retiring later. However, Spanish women are retiring later than men - gendered stereotypes belie the facts.

9. Examples of social dialogue in all subject areas

Spain: Discussions between employers and unions are often focussed on productivity issues.

Employer (private sector interview): *"Yes, when they sit down at a negotiating table I think the top theme is productivity which it is differently understood by employers and unions".*

A union rep complained of the narrow scope for negotiation between employers and unions, indicating that this fact made bargaining around active ageing issues, necessarily problematic, particularly when combined with a lack of inter-firm cohesiveness among employers in sector level bargaining.

Union rep (public sector, interview): *"I think the problem people who have to negotiate have is, firstly, that employers do not have a unanimous position when facing collective bargaining because everyone has his own interests; secondly...workers as a collectivity, given the high instability of the labour market (except for governmental officials) do not have the feeling that they should stand as one at the time of negotiation. Then, and I say it from the point of view of the worker, the negotiation range is very small ... the issues that one can only put on the table have just to do with asking for a minimum wage recovery and certain stability in employment."*

An employer talked about a two-speed system of social dialogue, "still anchored in the 19th century.": *"We (as partners in social dialogue) are talking about people above all, then people cannot be a bargaining chip for the employers or the unions. The unions have to adapt their claims to the reality that we have at the moment and the employer the same. Here there cannot be an agreement in which each one pulls one end; we all need everyone, and social dialogue is that, **social** dialogue. We sit down and if we do not agree, we get up, cool off and sit down again. And that is what is failing in my view, I still believe that there is no balance between the two of us. We're going at two different speeds."*

Italy: Employer's representative, (Rome Workshop 3): *"Trade unions have a key role in convincing the management and the works councils to apply statutory legislation, collective agreements and bilateral funds in a way that serves to manage ageing problems."*

Bilateral (jointly controlled) funds seem to offer an important way of spreading and financing good practices in Italy. Sector health bilateral funds are an instrument to protect workers' buying power and can be extended to provide benefits covering workers' families. In a similar vein, bilateral bodies in many industries have set up pension funds to complement public pension schemes, as well as training funds. However, as an employers' representative (Rome Workshop 3) pointed out: *"The sustainability of sector health funds in those sectors where the*

age average is high could be at risk as there is a high demand for healthcare. Also, welfare measures contained in collective agreements are put at risk by an ageing population.” So while the mechanism of bilateral funds may be used to spread good practices, it seems plausible that in some circumstances they may act as a break upon employers who may appear “over-zealous” in their pursuit of innovative forms of support for the older worker.

Poland: One union rep in Poland made the following comment about a different approach adopted to promote social partnership.

Trade Union Rep (Falenty workshop): *“We have established a so-called parity committee. It has been a good experience and I would encourage all trade unionists and all companies to create something like it. It means that the employers’ and trade unions’ ideas have the same value. All are considered with equal attention. The parity is that no decision was made if there is no collective agreement. It has functioned perfectly for four years.”*

UK: In all of the trade union workshops, reps were able to comment on a measure of social dialogue taking place. At the very least, union reps supported members in grievances and disciplinary issues and in relation to questions being raised about their job- capability. They also supported members facing changes to their contracts of employment. In some instances, this form of social dialogue (individual representation) can occur despite the lack of a formal collective agreement with the employer.) In the more formalised employer/ employee relationships, social dialogue (consultation and collective bargaining) covers major organisational changes impacting on job security, equalities issues, training and development and a wide range of issues concerning employee welfare and right to equal treatment. In the Building and construction sector, the National Health Service and some parts of the Financial Services sector, there is a high degree of collaboration and social dialogue between employers and unions. This applies particularly in the health and safety field in hazardous industries like construction.

Rep Financial services 1: *“I’ve been a union rep for about two years. Primarily workplace, helping members with their disciplinaries, grievances, basically any issue which a member has that we can assist with. Along with that, [I become involved in] any company decisions with changes of contracts generally across the company.”*

Rep 2: *“I have been a union rep since February this year. Most of my experience has come within capability, mainly. Disciplinaries, flexible working requests, as well as personal experiences over the years.”*

Rep 3: *“I work for XYZ in Stockton...I’ve been a rep probably close to 3 years now, and again I’ve really just dealt with disciplinaries, capability, things like that. Nothing particularly serious.”*

10. Examples of social dialogue specific to active ageing

Through the contributions of interviewees and members of our workshops, we observed examples of social dialogue in action. Whilst it should be said that there was little evidence of social dialogue occurring with an explicit focus on active ageing, as for example in clear and identifiable subject matter in joint meetings, our search embodied a questioning approach to establish whether in less formal ways there was indeed social dialogue occurring that in some way or another might bear upon ageing and *active ageing* issues. The following reports from our country based researchers suggest somewhat different answers to this question, country by country.

Spain: Researcher's comment: *"Extending working life is not on social dialogue's agenda as per our interviews and workshops. Examples of existing social dialogue specific to active ageing were almost non-existent. The closest that we got was, firstly the announcement of a new negotiation round to be open soon in a public institution in whose framework ageing (albeit, not specifically active ageing) will be tackled, and secondly, in occasional comments about infrequent social dialogue meetings when attempts to mention ageing issues were made with no further follow-up."*

Line manager (public sector, workshop): *"we have not dealt with it [active ageing]. This issue has not been dealt with in a specific way neither by the company nor by the bargaining committee. Actually, right now it's not on the agenda."*

Italy Researcher's comment: *"Although the promotion of active ageing is not among the priorities of social partners in Italy, the issue is starting to be considered following some pressures from their members (both workers and companies). This is in line with the traditional Italian logic of social dialogue and collective action according to which trade unions and employers' associations' strategies are shaped and influenced by problems emerging at the shop floor. Social partners recognise that active aging is an issue of considerable concern, but it needs time to go on top of their agendas. This is also why active ageing measures in collective agreements are still scarce."*

Poland: Research partner comment: *"Dissemination and strengthening the social dialogue institutions is obligatory as a process in which apolitical partners participate, talking regularly and transparently with each other. The greater effectiveness of cooperation is an obvious result."*

The following employer representative made a point about the need for the trade unions to be divorced from politics.

Employer Representative: *"The unions will only make sense to the entrepreneur when they are apolitical. The trade union is not a political organization. By their very nature, an employer should be an employer and not a participant in a political game"*.

Trade union rep: *“The basis for dialogue with the employer should be one that allows training or monthly meetings to be carried out or even to discuss the agreement between the employer and the trade union. Only for now there is no such thing.”*

Manager: *“Transparency of communication is the key to success. I am a strong supporter of thesis that if topics touch everyone, they should be discussed.”*

UK: Interwoven into all of the conversations on individual older workers’ barriers to staying economically active, was the difficulty many had in discussing support from their managers. This included asking for help in making changes to working hours, work stations or job roles. In some cases, older workers were afraid of being at risk of facing a “capabilities related dismissal”. Initiatives on active ageing tended to focus on individuals rather than collective responses. Dialogue on interventions to support older workers usually occurs directly between employees and their employer, often in an unstructured way. Trade unions frequently facilitate the discussion by representing individuals or groups of workers with concerns about working conditions, advising employers or promoting good practice.

The following are examples of social dialogue initiatives which can be seen to have real significance for an active ageing agenda in the UK.

- *NHS Working Longer Review* In 2013 as a result of Government decisions to amend pension ages, which met with considerable employee/union resistance, the National Health Service embarked on review of working conditions called, “the NHS Working Longer Review.” Most unions with members in the NHS made comprehensive submissions to this review, arguing for specific recognition of the risks faced by their members, and presenting well researched evidence in a series of papers including evidence from membership surveys and other sources. A Working Longer website and various tools and guides were produced and are now available for use by local NHS Trusts and their workers.
- *Construction Health and Safety* In the construction sector, unions play a key role in the regulation of health and safety on large building sites, and while there is rarely a designated focus around extending working life to these discussions, it was evident in our construction workshop that the sustainability of work for workers as they aged and their bodies wore out, was a principal concern. Our reps in the construction sector mentioned that they frequently arranged health and safety training courses for operatives on building sites
- *Problems around ageing and working* Reps commented on the different sorts of problems and issues their members faced around ageing and working. One aspect of this was that older people may want to continue working for broader social, psychological or ethical reasons than might naturally to be imagined as part of the employment relationship. The feeling of having a sense of purpose or being part of a group as they age is part of this. In some cases, issues had been taken up by reps with management.

Comment: In Spain, while there was no evidence of even an inchoate form of social dialogue specifically on active ageing being in process, in the other three countries, Italy, Poland and UK, it could be said that social dialogue on issues relevant to active ageing is proceeding, even though not necessarily defined as “ageing issues.” It seems likely that this form of social dialogue is in a sense supporting discussion of ageing issues (albeit “under the radar”) and may well be a model for future development where leadership and higher level awareness of active ageing issues has thus far failed to take off.

11. Innovative character and benefits of social dialogue:

In this section we will review examples which illustrate the beneficial or innovative character of social dialogue in the partner countries. Examples have been drawn from the comments of our research partners based on interviews and workshops held as part of the project.

Spain: In Spain small and medium sized companies (the vast majority in the country) find it difficult to devote resources to the social dialogue processes. The Spanish workshops did not produce examples of innovative approaches.

Italy has a longstanding tradition of social dialogue in line with the fundamental features of the European social model. Italy’s economic miracle following the second post world war, marked a turning point. Since then tripartite social dialogue in economic and social policy meetings has played a fundamental role in furthering democracy, social justice and a productive and competitive economy. Social dialogue provides social partners and other stakeholders with the opportunity to participate in deciding their future. The primary goal of social dialogue is broadly seen as to promote consensus building and democratic involvement among main stakeholders in the world of work. There is broad agreement that social dialogue and collective bargaining have advanced the living standards of Italian workers (both union members and non-members), because they were well matched to the traditional features of the labour market. However, increasingly heterogeneity in workforce composition is challenging the effectiveness of traditional social partners’ strategies. Efforts have been made to close labour market cleavages, for example between young workers and older workers; insiders and outsiders, immigrants and indigenous people. There is still progress to achieve in this respect. Employers are remodelling their representative structures, both through mergers of some employer bodies and the creation of new offshoots or sector organisations in some cases. Industry or sector bodies have been striving for more representativeness and authenticity. Disaggregation across sectors has become common leading to increased competition for representativeness within industries resulting, in turn, in forms of social dumping in collective bargaining.

Poland: Uniquely, our Polish partner described a national conference convened by the Solidarnosc trade union, in which union reps, employers and local authority representatives

from across Poland were briefed on the content and opportunities offered by the Framework Agreement on Active Ageing. Whatever the weaknesses of Polish unions at the workplace, their political influence and reach seems to open opportunities.

UK: British unions and the TUC have become increasingly conscious of their social mission to re-establish unionism as a predominant vehicle for social dialogue via workplace representation. Innovations in organising, representation and bargaining for members have been central to this policy. Whilst not directly involved in collective bargaining *per se*, the TUC has played a creative role in campaigning and harnessing the energy of the wider movement, particularly in promoting a form of “New Unionism” to engage with people who have increasingly been unreachable by the unions.

A bargaining agenda has been promoted which embraces equalities, learning, training and development, health and well-being. Significant investments have been made in training a new generation of union organisers. Individual unions have taken these approaches into workplaces. While the New Unionism approach favours a campaigning (even confrontational) style to break down worker apathy, in practice its creative agenda has often sat harmoniously with mature HR management practices. In particular, the unions have sought to demonstrate added value to companies which worked collaboratively with them around this newer agenda, including working in partnership on issues concerning employee learning, health and well-being, equalities issues and more.

Despite all these positive developments, UK unions have not generally driven a consistent narrative around *active ageing, extending working life and age management* as such. On the other hand, they have been concerned with issues including maintaining employability (particularly through encouragement of learning) and preserving working capacity (through health and well-being initiatives). All of these issues have featured in union led campaigns as well as in joint partnership working, where a collaborative style has been achieved. However, an explicit link with ageing has not on the whole been recognised in these activities, so it would be fair to describe social dialogue in the UK as generally lacking a strong focus on ageing, though by no means ignoring ageing and its consequences.

While the UK workshops revealed no particular knowledge of the framework agreement, the same workshops showed significant grass roots support for each of the separate elements of active ageing and a readiness to engage in proactive social dialogue upon them. It seems likely that encouragement and “nudge” approaches to support social dialogue around active ageing, would catalyse supportive activities, at least in the sectors covered by our workshops. On the whole therefore, we found a climate in which there is a readiness to engage over active ageing, but in which there is need for more work and education of union and employer representatives in order to carry the social dialogue process forward.

12. Role of Government in promoting social dialogue

We requested comments of researchers on how far and in what ways Governments in their countries have influenced the development of social dialogue. Responses are summarised below:

Spain: Recent history of social partnership in Spain has been one of significant shifts and changes. Involvement of the social partners in industrial policies has traditionally been limited other than with regard to issues such as training and restructuring of industries. In 2011 under the Socialist administration an agreement was reached between the Government and the Social Partners on energy, industrial and innovation policies, aiming for significant impact at the macro level and to promote growth. Since the Popular Party took office in 2011 there has been little or no social dialogue on industrial policy. The unions have been strongly critical of the lack of such policies. Industrial Observatories have been established in some sectors. These are tri-partite bodies that look at given sectors from business, labour and technological perspective, analysing strengths and weaknesses and recommending courses of action. At the local level it is common to find the so-called Strategic Plans. Strategic Plans are socio-economic plans characterised by the involvement of the main regional, economic and social partners. They tend to focus on assuring jobs and attracting foreign investment.

Researcher's comment: *"Throughout our fieldwork, examples of governmental promotion of social dialogue are indeed rare. However, in December 2017, the Popular Party's Government resumed social dialogue through working on a tripartite agreement for the increase of the minimum wage. Further progress has been witnessed since the Socialist Party came into office. In July 2018 the Minister of Labour, Migration and Social Security kicked off the social dialogue to start working "immediately". Working groups have been created dedicated to employment and labour relations, equality, Social Security, vocational training and the fight against the underground economy, as well as the drafting of a new Workers' Statute. However, as of yet the ageing of the workforce has not been pointed out as an issue to look at."*

Italy: The Italian structure of collective bargaining was profoundly shaped by a tripartite framework agreement signed at the inter-professional level on 22 January 2009 and later, a tripartite framework agreement – signed at the inter-professional level in January 2014 by Confindustria, Cgil, Cisl and Uil. Both of these agreements had at their root, the objective of creating a more flexible domestic labour market. The system of bargaining is underpinned by similar pacts signed outside the industrial sectors. Taken together, these agreements have created a voluntary, comprehensive multi-employer bargaining model, with the 2009 national sectoral collective agreement regarded as the basis of the system.

Since the start of the crisis in 2008, wage setting and collective bargaining systems in many EU countries came under pressure to follow the logic of companies and market imperatives. Fostering decentralization of collective bargaining became one of the key objectives of the

European model of Economic Governance. The 2009 (and later the 2014) agreements therefore paved the way to a process of organized decentralization. Although the scope of this decentralized bargaining is defined by national sectoral collective agreements, opening clauses allow decentralized bargaining to deviate from standards set by national sectoral collective agreements. The process of decentralisation was itself fostered by a series of legislative measures in 2009. One element of this was the creation of taxation arrangements favourable to the growth of incentivised payment systems. In their very nature, such systems demand local agreements. Hence, to boost performance and productivity and to encourage decentralised bargaining, the Government introduced regulations allowing additional wages linked to productivity to be made exempt from income tax and social security contributions. Different forms of incentivised or bonus related pay are eligible, though one important proviso for tax relief, is that the agreements arise from decentralised bargaining and are concluded at district, company or plant level.

To further promote decentralization, in August 2011 the government passed Article 8 of Law No. 148/2011 (the Budget Law). The provision allows bargaining at lower level to derogate from sectoral agreements and national legislation, even those concerning employment protection. In July 2013 the Constitutional Court provided a new and more extensive interpretation of Article 19 of Law number 300/1970, according to which trade union workplace representative bodies can be set up by trade unions that participated in the negotiation of agreements in force, even if they did not actually sign any of them. This is a significant innovation since before that decision only organisations that formally signed a sectoral and/or company collective agreement in force in the workplace could run in election for employee's representatives. Hence, it may be seen that the Italian state has been purposefully following a strategy of decentralisation of bargaining and enhancing the role of local bargaining and dialogue.

Poland: In the last few years, there were contradictory political changes in Poland regarding the retirement age. In 2012 the centrist government raised the retirement age to 67 in line with the prevailing European trend to raise retirement ages in response to increased life expectancy and people remaining healthier. Then in 2017, just as the social dialogue partners had begun to understand the necessity of the former government's decision to raise the retirement age, the ruling (right wing) Law and Justice Party (PiS) *reduced* the retirement age to 60 for women and 65 for men. In policy terms the decision made little sense as Poland's 38 million population is among the most rapidly ageing in Europe and unemployment is now at an all-time low since the transition from communism in the early 1990s. Many economists believe that the government has thrown away its most important tool to increase participation in the labour market. Forecasts from Eurostat suggest that even without the lowering of the retirement age, the labour force will shrink by over 4 million (almost 20 per cent) up to 2050.

Public opinion on the changes is contradictory. On one hand 78 per cent of Poles supported the reduction in the age of retirement. (There is little trust in the government and these rapid changes in public policy result in an, ‘as soon as possible’ attitude towards leaving the labour market.) Against this, a large proportion of Poles return to the labour market as working or self-employed retirees. (There was an increase of 90,000 in 2017). This arises because Poles, have seized upon the legal loophole allowing them to retire, draw their pension and recommence employment in the same position. Hence, the employee receives additional income and the employer is able to negotiate a lower wage paid for the same work. Another angle is that whilst many Poles are in principle inclined to take the opportunity of earlier retirement, pensions are very small and in many cases people miscalculate their financial situation post retirement. Hence returning to work to make good the shortfall makes a great deal of sense. It is somewhat strange that such actions are permitted by law, though more work may be needed to assess in aggregate whether the policy has had a net positive or negative impact on *active ageing*, in its widest sense.

UK: Government has for many years had an important role in shaping industrial relations, including promoting social dialogue and good practice in the UK. British trade unions for many years followed a strategy of voluntarism, whereby the law was as far as possible kept out of industrial relations and the settlement of industrial disputes. In the post WW1 era, local “Whitley Committees” and National Whitley Councils were established, and in key public sector industries they remain the main forums for negotiation of terms and conditions of employment. The right for unions to bargain and be consulted in the public sector therefore rests heavily on past and present Government policies which have accepted the importance of their role.

In the private sector, employee rights to bargain and consult collectively have been established irregularly, industry by industry, often by a combination of industrial conflict (recognition strikes) and sometimes Government influence, (particularly where government contracts might be jeopardised by disputes). Large areas of the private sector however remain non-unionised and unions are not able to engage in any social dialogue.

In companies where unions are recognised, the importance of local workplace representatives has been progressively strengthened in the post WW2 period. Initially, this owed much to the need for a quick, on the spot informal bargaining method, for example over piece work rates. However today, where unions are established, the issues may be quite broad. Nonetheless, in the private sector, union representation is considerably weakened with the result that social dialogue has been in decline.

Government legislation has played an important role in maintaining an element of social dialogue. To mention some examples, the evolution of health and safety legislation was one means through which social dialogue became established, with a right of recognition of Health and Safety Committees and Health and Safety Representatives in union recognised workplaces, under legislation passed in 1974.

Formal consultation rights over collective redundancies were given to employees through recognised unions in 1975. (No such rights existed for non-unionised workers). Thirty years later in compliance with EU legislation, the Government passed the Information and Consultation of Employees (ICE) Regulations providing a means for all employees (unionised or not) to be consulted over big decisions including threats to their security of employment.

The Government agency ACAS supports good practice and encourages employers to consult and provide timely information to employees. By and large, information exchange is treated as a voluntary process and whilst there is a legal procedure for unions to demand the disclosure of information if withheld, it is rarely used in practice.

Hence, in all the foregoing ways, Government has helped unions to engage in social dialogue with their employers, though as explained, the coverage of social dialogue follows a mixed picture with little depth in some sectors and an uneven spread across industries and sectors.

13. Industrial co-ordination methods in Spain and Italy

Spain: In Spain most collective agreements are of a sectorial nature. In 2017, only 265,000 workers depended on agreements signed at corporation/employer level whereas labour conditions of 3.6 million employees were linked to agreements which had been signed at levels above that of their corporations/employers (i.e. at local, regional or national level). Therefore, it is clear that sectorial protocols are the predominant means of regulation compared to those involving local (individual) corporations/employers. (Construction and agriculture are the two sectors with the largest number of collective agreements signed beyond the corporation level.)

Industrial relations and co-ordination of the labour market is principally conducted through well organised, vertical structures of employer and trade union organisations. Negotiations are highly focused on bargaining through the national institutions both on the trade union and employer side. A recent wage agreement reached at national level in Spain, gives a flavour of the approach adopted. The agreement (a pay agreement) provides general guidelines for negotiators at sectoral and company level. It was signed by the most representative trade union organisations on one side – the Trade Union Confederation of Workers' Commissions (CCOO) and the General Workers' Confederation (UGT) – and employer organisations on the other: the Spanish Confederation of Employers' Organisations (CEOE) and the Spanish Confederation of Small and Medium-Sized Companies (CEPYME). Known as a "Peak Level Inter-Sectoral Agreement," it will have an important role, providing general guidelines for negotiators at sectoral and company level, covering wages and collective bargaining up to 2020.

Italy: To understand how industrial relations shape active ageing policies, it is important to underline that Italy has a multi-level approach to the regulation of the labour market and

working conditions. Legislation, collective bargaining, bilateral institutions (set up by social partners) and human resources management (HRM) are all part of the regulatory system. The interaction between these instruments of regulation is crucial to an understanding of the country's strategies towards an ageing workforce and the extent to which those strategies have been effective. The three forms of regulation are in principle complementary and coordinated – at least, most of the time. It is expected that legislation once implemented, will be complemented by collective bargaining provisions. Similarly, collective bargaining standards and other bilateral policies negotiated at sectoral level are expected to be applied via firm-level bargaining or Human Resource Management policies and practices at company level. National sectoral collective agreements (NCLAs) are signed by federations of employers and employees at sectoral level, and set basic standard rates for the “categories” of workers concerned – that is to say, occupational groups identified by the scope of the agreement. Coordination between different sources of regulation is based on vertical and horizontal subsidiarity. However, agreements made at central level are not mandatory, thus companies can choose to apply them or not. This explains why, except for mandatory legislation and some collective bargaining measures, most of the normative or economic provisions that are potentially useful to manage an ageing workforce are not implemented. Disconnect between horizontal coordination policies and their implementation is a characteristic of the Italian model of capitalism, welfare and industrial relations.

14. Bilateral approaches and bilateral funds in Italy

Originally established only in the building and construction sector, bilateral bodies were conceived as instruments to allow joint control of financial resources collected by employers' associations and trade unions to deal with certain needs or times of crisis in people's working lives. The bilateral body allocated benefits to support workers experiencing illness, occupational injuries, a work stoppage or reduction of working hours and so on. Following this initiative in the construction sector, a system of bilateral bodies developed in other sectors in the early 1980s. The sectors concerned were those where micro enterprises, unstable employment, a high turnover of employees and widespread use of atypical and undeclared work prevailed. It followed that in these sectors there were weakly developed systems of industrial relations, little collective bargaining and limited trade union presence. (Examples are the artisan sector, commerce and tourism and – more recently – liberal professions.) Bilateralism has developed in these sectors as a cooperative method of stabilizing both products and markets, and as a form of protection for workers by means of the joint administration and governance of the entire labour market. Bilateralism offers a paradigm of a new system of cooperative and collaborative industrial relations. In the context of the Italian system of industrial relations, the expressions “bilateral bodies” or “joint bodies” are used to refer to entities that are set up and regulated by means of collective bargaining and that have three main features:

- They consist of representatives from social partners who conclude collective agreements through which such bodies are governed;
- They provide (employment) services and protection to both workers and employers in accordance to what is laid down by collective agreements and statutes (employment law). Funds for bilaterally administered activities are collected through contributions from employers and – to a minor extent – from workers;

Bilateral bodies are independent, sovereign organisations, controlled by the parties that comprise them and autonomous legal entities.

Bilateral bodies have played an active role in renewing the Italian labour market. They are counted as a source of labour law, classified as a “privileged channel” for the regulation of the labour market (Art. 2, par. 1, sec. H of Legislative Decree No. 276/2003). Bilateral bodies have been set up in different industries not just as a mere service provider, but rather as a means for assisting labour market stability and protecting workers by way of the joint administration and governance of the entire labour market. Accordingly, bilateralism is regarded as an instrument established to enhance cooperative dialogue among social partners and the full implementation of mechanisms of protection for workers, such as the provision of benefits laid down in the collective agreement.

Based on such successful experience in terms of governance and joint administration, in 2003 the bilateral bodies were given new and wider set of powers. Art. 2, sec. h of Legislative Decree No. 276/2003, allows for bilateral bodies to handle issues such as:

- promoting more stable and better quality jobs;
- providing outplacement services;
- devising programmes for training, particularly by means of on-the-job learning;
- disseminating good practices, eradicating discriminatory practices and favouring the integration of disadvantaged groups into the labour market;
- setting up and administering mutual assistance funds for income support;
- ensuring that employment contracts and contributions schemes comply with certain standards;
- developing actions and initiatives relating to occupational health and safety;
- Undertaking other activities assigned to them by collective agreements.

15. Co-ordination in Poland and the UK

Poland and the UK are characterised by relatively low levels of industrial co-ordination, low unionisation (though concentrated in the UK) and low social dialogue in the strategic decisions concerning industrial development or employee relations at sector level. The two countries are very different in some respects, particularly with regard to the evolution of social dialogue in its different forms. In Poland there is strong support for a system of tri-partite social dialogue but little bilateral social dialogue in the form of collective bargaining. In the UK, a period of thriving tri-partism from the mid-1960s until the early 1990s has now

been substantially eroded. Bi-partite social dialogue remains strong, particularly in the public sector. The history and context of these respective developments will be explained below:

Poland: The post-communist era saw the evolution of a national structure of social dialogue in Poland. Whilst this has not always been straight forward and continues to suffer from insufficient representation of employers' organizations, a weakening of the trade unions, and some questionable policies by the government, social dialogue structures are alive and well, especially tri-partite social dialogue (government, employers and the unions).

Evolution of social dialogue legislation and structure: Structural changes occurred following a period of dispute in 2013, when the three national trade union representative organisations (the NSZZ 'Solidarność, the All-Poland Alliance of Trade Unions (OPZZ) and the Trade Unions Forum (FZZ)) – walked out of the Tripartite Commission for Social and Economic Affairs which was at that time the state central social dialogue forum. (This was ostensibly in protest over government revisions of the labour code to make working time more flexible, but came in a context of disillusionment with other government measures, notably affecting retirement and pensions.) A period of agitation and protest culminated in 2015 when all of the parties agreed upon the formation of a new central body, the Social Dialogue Council (RDS) which was then passed into law.

Present structure of social dialogue: The RDS is responsible for conducting dialogue 'aimed at facilitating conditions for socio-economic development, as well as increasing competitiveness and social cohesion'. It aims to achieve 'participation and social solidarity in the field of employment relations', in contrast with its precursor's role of simply 'maintaining social peace'. The chair of RDS rotates among the three parties yearly. The RDS is granted a separate budget, and has an administrative unit serving its needs. It also has the right to initiate legislation on the issues for which it has responsibility including 'socio-economic development, the enhancement of national economic competitiveness and social cohesion' and presents an annual account of its activities to the Polish parliament. Below the RDS at national level, the Voivodeship (Provincial) Councils for Social Dialogue operate. In addition, the key industrial sectors all have Sectoral Tripartite Commissions involving the government, trade unions and employers. Hence, there is (in theory at least) ample opportunity to build more effective social dialogue, including around *active ageing*.

Collective bargaining: In contrast to this strong tripartite social dialogue structure, bilateral social dialogue is rather weak. Collective agreements exist basically only at the level of large enterprises and in the public sector. Moreover, their number is decreasing. The following quotation suggests that for some employers at least, the institutionalised system of tri-partite social dialogue is an adequate substitute for bilateral social dialogue directly between employers and trade unions at company level.

Employer Representative (Olsztyn): *“The national and provincial councils of social dialogue are invaluable, they are of a great worth. This value should be expanded downwards. In my view, these social dialogue councils should be based on the key feature of a dialogue and encouraged to develop at the level of counties and municipalities. We should create a certain extensive structure that will facilitate the implementation of specialized solutions. This may even be an incentive since formally in the amended Act on the councils of social dialogue, nothing seems to be forbidden. We will probably lead to this because I have already had one and two meetings with Olsztyn District Office encouraging people to think about creating such a thing.”*

United Kingdom: In the UK, in organisations or sectors recognising unions, there is in principle considerable scope for social dialogue around active ageing or other matters. The principles of employee consultation and involvement are well understood, even though the expression “social dialogue” is regarded as a European Union term. As explained in section 12 above, the extent to which employers recognise trade unions in bargaining and representation matters, varies from the private to the public sector. (The public sector tends to be well unionised in contrast to much of the private sector.) Involvement over planning and strategic decision making is however limited. The following paragraphs explain some of the background.

The ICE Regulations: Until recently Britain has not had laws obliging employers to establish works councils or enterprise committees. Driven by the 2002 European Directive on consulting and informing employees, the Information and Consultation of Employees Regulations (2004) (the ICE Regulations) established for the first time in the UK, a statutory framework giving employees the right to be informed and consulted by their employers on a range of key business, employment and restructuring issues. The Regulations have had a relatively limited impact on employee consultation, in part because of the high threshold of support which needs to be established for employees to trigger their formal rights and in part because employers have several choices as to the means of sharing information and consulting with employees. Establishing a works council or consultative forum, is one among several approved mechanisms that can be adopted. Voluntary ‘pre-existing agreements’ may pre-empt the use of the regulations’ procedures. The regulations leave wide scope for management inaction or unilateralism, and for unenforceable and weaker forms. Such arrangements can be through one to one and team meetings, company handbooks, newsletters and so on or via employee forums or works councils. The effectiveness of employee forums in non-unionised workplaces has not been reliably measured, although some seem to be more effective than others in the same way as in unionised workplaces. Our interviewees and workshop participants in general believed that social dialogue through trade union representation is most convincing and effective as it is supported by the resources and training unions provide to workplace reps.

National and sector level regulation/ social dialogue: Outside of the workplace and the established consultation structures in some industries (see section 12 above), there are limited opportunities for UK workers to influence broader sectoral development, manpower issues or economic development. This has not always been the case. In 1962 a policy of “tripartism,” in national and local economic planning, was adopted through a National Economic Development Council (NEDC), serviced by the National Economic Development Office (NEDO). This continued until the disbandment of the system in 1992. The NEDC was a forum for representatives of business, the trade unions and government. Beneath the NEDC (sometimes referred to as “Neddy” were a series of Sector Working Parties (SWPs, or “little Neddies”) which commented in detail on development issues in all of the major sectors. Separately, a system of Industrial Training Boards was established, which co-ordinated approaches to training and qualifications in each sector. With employers and trade unions represented on all of these bodies alongside Civil Servants and Government Ministers at the NEDC level, social partnership could be said to be “alive and well” in this epoch.

It might be said therefore that social dialogue has taken several steps backwards in the UK. Today there is very limited opportunity for such dialogue at national, regional or local level. Thirty eight Local Enterprise Partnerships (LEPs) (for England) were established in 2011 comprising representatives of employers and local government, but no places are reserved on these for the trade unions (in contrast to the system in the former Regional Development Agencies (RDAs) which the LEPs have replaced.) The LEPs determine economic priorities and undertake activities to drive forward economic growth or make assessments of skills and manpower needs in their local areas, but generally they offer limited scope for social dialogue. In June 2012 the TUC commented in evidence to the Parliamentary Business, Skills and Innovation Committee that, “...In large part the LEPs have failed to engage trade union and other key social, economic and environmental stakeholders.” (TUC evidence 2012). It remains open however, to the LEPs to recognise the role which unions could play in promoting positive practices and harnessing the energies of employees - *active ageing* being an issue which could well provide such an opportunity.

16. Extending social dialogue to small businesses.

Researchers were asked for their judgements of the phenomenon whereby small businesses do not seem to engage bilaterally with their workforces. Was this simply a product of the greater proximity of the employer with each individual worker, thus short circuiting the need for any kind of “collective voice” by the workers? Was it more to do with the time costs involved in going through a process of engagement with workers? Or was there some other reason. We did not find overall convincing answers to these questions, though the following researchers’ comments country by country shed a little light on the position of the small business, if only to confirm the foregoing general observation:

Spain: Company-level collective agreements have not boomed... small and medium companies (the vast majority in the country) still find difficult to devote resources to social dialogue processes.

Italy: When it comes to unions' power, companies' size matters, as the divide between SMEs and big companies affect trade unions representativeness and logic of collective action. Small companies are difficult to unionize and HRM prevails over industrial relations. Many trade unions rights and prerogatives do not apply in companies with less than 15 employees.

Poland: Small and medium-sized companies rarely have a union presence. Research for the STAY project (2017) shows that in most small and medium-sized enterprises there are neither trade unions nor other forms of employee representation. Only 11 per cent of companies had non-union forms of employee "voice" or representation, while 8 per cent of respondents reported the presence of trade union organisations in the company.

UK: Social dialogue does not reach small businesses in the UK because these firms tend not to have any recognition agreements with unions. That said, there is often an informality and openness in the relationships between employer and employees in small businesses, which facilitates social dialogue on an individual employee level. The following paragraphs will set out two possible ways in which unions could engage with small businesses in the UK.

Most Small businesses are members of local Chambers of Commerce and Industry which serve every locality and every sector in the UK. The national organisation, British Chambers of Commerce (BCC), links this network together and provides a programme of events and research as well as a mechanism for lobbying Government. While there is rarely any working relationship between local chambers of commerce and local trade union organisations, there are times when they do come together to lobby for shared demands. (A joint TUC and BCC demand to the Government to resolve uncertainty over the legal status of migrants arising from the UK's Brexit decision, was such an example in December 2017).

Other avenues of local social dialogue could be through the network of *Local Enterprise Partnerships* (which disburse substantial funds for local training funding and economic development). However, the TUC has strongly criticised the LEPs for failing to build collaborative relationships with the trade unions and other social, economic and environmental stakeholders. The potential of the LEPs to reach small businesses in their area, offers an obvious opening for expanding social dialogue, providing there is a willingness to "treat."

17. Understanding of issues germane to Active Ageing

Our concern in the workshops was to establish how far union reps and employers respectively were familiar with the rules and technical regulations surrounding issues germane to active ageing in their own countries and how far union reps sought to influence employer' or public policies. Participating in social dialogue around active ageing seemed to demand a certain level of knowledge and awareness of a number of technical issues as well as familiarity with the work-life situations of employees and we were keen to establish how far such a knowledge base might exist, both among employers and employees. Researchers commented on levels of understanding, firstly in relation to pensions issues, then separately regarding employers and union reps, in terms of their understanding of policy, rules and legal provisions in relation to age discrimination, apprenticeships and training and on the policies of their government in relation to the ageing workforce and retirement.

17.1 Pensions

Researchers were asked whether workshop participants (both management and union reps) complained of a lack of clarity of pension issues in their country and for their assessments of how well they understood the rules and regulations around pensions.

Table 7: How much did Employee and Management Reps understand pension rules in their Country? (Assessments by researchers based on participants' contributions in their workshops)

	High Understanding	Modest Understanding	Little Understanding	No Understanding
Italy	X			
Poland			X	
Spain			X	
UK		X		

Comments and quotations on pensions issues:

Spain: Our Spanish researcher stressed that the feedback from workshop participants could only shed light on the local position and not levels of awareness nationally.

Union rep, (public sector workshop): *“Many of the queries that I got as union rep have to do with retirement. For example, they want to know, ‘How much will my pension be?’ ‘Should I stay until 70 because I would like to keep working?’ ‘If I stay, will my pension be reduced to rubbish?’ Or, ‘Is it worthier to step down now?’”*

Human Resources Manager (Private Sector workshop): *“While the national policy is good, it seems that they want people to understand that private pensions are important. (...) It is all about a series of interests, I see it that way, and of course there is a lot of misinformation because the policy serves different interests”.*

Italy: Trade union representative, (Rome workshop 1) *“The latest reforms in public pensions system, that took place in 2012 with Fornero law, have increased the requirements to obtain a public retirement pension”.*

Poland: The Polish workshops reflected concerns about the confusing change of public policy around pensions and retirement.

Researcher’s comment: *“When we look at pensions issues, we can find examples of contracts framed to meet the interests of both the organisation and the employee, particularly as they enter the years approaching retirement. We have tried to find solutions which, on one hand, provide security and confidence for the employee approaching retirement, and on the other, understand the kinds of activities and arrangements which fit in, as far as the company is concerned.”*

UK: Researcher’s comment: Reps’ understanding of pension issues varies from high to modest. Management representatives may have had a somewhat deeper understanding but not significantly so. Most reps admitted that they and members were vague on pension details. The problem most frequently raised by both reps and managers was lack of clarity of the rules and the changing nature of pensions, notably the decline of defined benefits “final salary” schemes.

There was discussion on how far pension schemes facilitated (or inhibited) working longer. For example, we noted reported views among union members to the effect that the income tax system penalised those who drew their pension whilst continuing to earn a salary. The concept of partial retirement was seldom raised in the workshops.

Employers’ Rep (Interview ENEI): *“I suppose there are a lot of areas where there is agreement especially around the need for pension policies which ... don’t make it more difficult for people who want to work longer, to do so. For example, being able to draw your pension while staying in work which I know was quite difficult for a while not too long ago.”*

17.2 Age discrimination rules

Table 8: How far did Management participants understand policy, rules and regulations around age discrimination? (Assessments by researchers based on participants’ contributions in their workshops)

Italy	No understanding
Poland	Modest Understanding
Spain	No understanding
UK	Modest Understanding

Comments and quotations on extent of understanding of age discrimination (Management)

Spain: "Line manager (Private Sector workshop): *"I believe that in general there is a lack of knowledge of these policies, as it is the case in Spain with all policies emanating from the European Commission. In Spain we do not give importance to the European Commission."*

Italy: Employer representative (Rome Workshop 3) Speaker believed that, *"a public system of welfare that implements active labour market policies, both regarding outplacement and vocational training, is necessary to guarantee the inclusion of older workers in the labour market...."*

Poland: No comments.

UK: Researcher's observations: There was a fair degree of awareness of the important facts about age discrimination, though the finer technical aspects of the legislation tended not to be fully understood either by employers or union reps. For example, the erroneous idea that "you cannot do anything different for a particular age group because this would be ageist," seems to be alive and well. We heard of no organisation presently following policies requiring people to retire at a given age. On this level therefore, age discrimination appears to have been effectively eradicated. However, managers and reps seemed to have only a sketchy understanding of the technical provisions of the law and issues around ageism and age discrimination rarely get aired in discussions between union reps and management.

Table 9: How far did trade union representatives understand policy, rules and regulations around age discrimination? (Assessments by researchers based on participants' contributions in their workshops)

Spain	No understanding
Italy	Good
Poland	Good
UK	Good/ Modest

Comments and quotations on understanding of age discrimination (union reps):

Spain: Our Spanish research partner commented that (as in the case of management participants), trade union participants had: "No knowledge on age discrimination regulations."

Italy: Union reps in our Italian partner's workshops appeared to be familiar with the broad issues of age discrimination policy, rules and regulations as the following quotations suggest.

Union Rep (Rome Workshop 1): "Equality is not only about active ageing but it is also related to the broad concept of diversity and discrimination, gender differences and reasonable adjustments"

Union Rep (Rome Workshop 3): “It is also necessary to better communicate the existence of active ageing measures as usually workers are not aware about that, but only know early retirement.”

UK: Union reps tended towards a, “well, we have seen all this before,” sort of attitude; exploring the fact that age discrimination continued but lacking either the knowledge of how to use the law or the conviction that it would be beneficial to them or their members, at the end of the day.

Rep (Voluntary, Health and Local Government workshop: *“I mean, lip service is paid to equal opportunities.people do get looked over when they get older or ...their face doesn’t fit because the boss doesn’t like them or whatever. So, it’s often not to do with any qualification or your ability to do the job. Its other factors which are very hard to prove in terms of discrimination. It’s actually very hard to prove discrimination because you’re older. They go against the law but they’re still getting away with it...”*

Rep, Financial Services: *“To be honest, speaking personally, I never thought of this (age discrimination) as an issue I thought, ‘Oh, it’s illegal to discriminate on the basis of age, problem solved,’ and it’s far from the case. So, I don’t know.”*

Another rep however, seemed more conscious of a possibility of going beyond direct discrimination to indirect age discrimination. She seemed to understand that use of such a device might be useful in leveraging positive changes in conditions to the advantage of older workers.

Financial services sector union rep: *“I feel like they’re dealing with the direct discrimination, but it’s the indirect (that is making the difference). That’s just there but they’re not doing anything to fix it. So, yes, we need to say you can’t discriminate against age, but that’s the direct part of things. What are they doing to put in place in terms of, say, training and things so that they’re not discriminating?”*

I don’t feel like they’re picking up that element there. So, yes, they’re looking at the direct side of things, but they’re not looking at the indirect in terms of what they can do to stop discrimination and disadvantage from happening.”

17.3 Apprenticeships and training:

Given that a key issue in developing momentum towards an active ageing approach is the ability to reskill the workforce and support career transitions over the life course, our enquiries sought to establish how far managers and union reps respectively were comfortable with the technical detail in relation to training and apprenticeships. Again, we adopted the same parallel approach of querying our research partners for their impressionistic judgements and seeking evidence from recorded comments from workshops and interviews.

Table 10: How far did Management participants understand policy, rules and regulations around apprenticeships and training? (Assessments by researchers based on participants' contributions in their workshops)

Italy	High
Poland	High
Spain	Modest
UK	Little

Comments from managers on apprenticeships and training

Spain: The Spanish partner described management's understanding of apprenticeship and training issues as 'modest.' One line manager commented on a system in which "relay contracts" are issued to allow younger workers to train in new skills whilst an older worker is offered partial retirement.

Line Manager, Private Sector Workshop: *"Under the relay contract a worker at a certain age can choose to collect half of his pension while the other half is paid by the company. To substitute for the older worker a younger worker comes in. However, I think that this type of contract has failed, as it is the case with almost all similar policies. The relay contract would be fine if 50 per cent of the time of the new worker was devoted to training. However, we make workers work rather spend time on training. This kind of thing has happened before, for example with a scheme of dual vocational learning. We have wasted these opportunities for vocational learning. In the rest of Europe such schemes work but here they do not. Why? Because we take the apprentice and put him in to do the job of a fully-fledged craftsman but without previous training."* (See the comment of a union rep later, corroborating the above analysis.)

Italy: Employer rep (Rome Workshop 3) *"Older workers (from 40 to 60 years old) are even weaker than young people that have to enter the labour market, as for them (young people) there are tax incentives for open-ended employment contracts, apprenticeship, etc."*

Poland: Our employer representatives in the Polish workshops shared little on the subject of apprenticeships and training. However, one employer made the following comments, citing a specific case and arguing against the perceived "unfairness" that employers were obliged to meet the costs of young workers in training:

Employer Representative (Craft Sector): *"Here is a specific case. A young man was starting work. He was offered a job which was accepted. A contract was signed and the next day he went on a sick leave. He has not returned, there is a problem but what can his employer do about it? They have to pay his salary and still they do not have an employee."*

UK: Management appeared to understand most of the traditional issues in relation to the need for training employees in skills and the traditional role of apprenticeships. However, new regulations introduced by the Government have caused confusion among many employers, resulting in a fall of one third in the number of apprenticeship places being offered in the past twelve months. The blame for this disastrous fall in the numbers of young people entering workplace based training, is put down to the complexity in the new system of employer levies and grants to ‘support’ apprentice training, which have been described as excessively bureaucratic and complicated and are clearly having a completely counter-productive impact.

Table 11: Assessed Understanding of policy, rules and regulations around apprenticeships and training (union reps)

Spain	Good
Italy	Good
Poland	Good
UK	Good

Spain:

Relay contracts allow for the partial early retirement of older workers and the simultaneous hiring of younger workers who are expected to train and acquire the necessary skills to do the jobs previously performed by the older worker. Such contracts involve training of younger workers. However, critics maintain they are not working to the purpose for which they were formulated.

Worker (private sector, workshop): *“I have seen that when you go to an early retirement relay that covers that post, the new younger worker is taught but then, when the older worker gets to full retirement, the employer does not hire the same younger worker but instead another worker. ... The employer does not really seek to give experience to the younger worker who supposedly came to do the full job of the early retiree.”*

Italy: Apprenticeship schemes, which allow individuals to acquire professional or trade qualifications in Italy, represent a form of cross-generational solidarity and are regulated by sectoral collective agreements/ collective bargaining and statutory legislation. They are used in all sectors. In each sector, national sectoral collective agreements provide detailed regulation of all the standards apprenticeships, including the wage levels of apprentices and the contents of the training schemes. Apprenticeships are a good example of a cross-generational approach with the younger apprentice, in general learning from an older craftsperson or mentor. (It should be stressed that there are no formal provisions related to ages of apprentice tutors, though because they generally have long experience of the trade or skill that the apprentice is aiming to acquire it follows that the apprentice is generally younger than his or her mentor.)

Apprenticeship is regulated by both statutes (law) and sectoral collective bargaining. In each sector, national sectoral collective agreements provide detailed regulation of all the normative aspects of apprenticeships, including wage levels and training contents.

UK: Apprenticeship training was a serious concern to reps in the building and construction sector. They were particularly bitter about the “watering down” of skills required in their various trades and felt that fewer operatives were coming to the industry via time honoured four or five year apprenticeships followed by a period of working as a “journeyman” alongside a master craftsman. Highly skilled aspects of jobs were often reserved for a small band of older, higher skilled operatives while the more recently (and lower) trained younger operatives were set to work on less challenging work. Union reps were critical of the “watering down” of skills which they witnessed and saw it as symptomatic of a “cost is all” management culture and a profit motive which was driving decisions. They deplored the short sightedness of management in failing to invest in training new entrants to their industry and described a situation in which the “real skills” of their trade were increasingly only the province of older workers.

Rep: “In our trade as a bricklayer, what they’re doing now, they get a couple of old bricklayers, old boys, and they’ll be the ones that they will send out to build the corners. They’re the ones that set out the windows. If you get these young guys, all they do is run in the middle. They never learn the skillset, how to build a corner. But we’re going to lose that skill in the end when the older people die.”

Rep: “Electricians, you have one or two qualified electricians and the rest of them are just pulling cable and sticking it up. So, we’re watering down the trades, but it’s going to get to a point when the older people are going to retire and there’s no one there to replace them.”

Rep: “The other thing is that they’re advertising to train all these young lads as gas fitters, gas testers, gas engineers in six weeks, eight weeks, six-month electrical course. They knock them out in six months now. The colleges are there just earning money out of it, just putting people through. It’s all money making.”

Reps complained that they were not now being asked to pass on their skills to younger workers in the time honoured way - a damaging trend for which management were clearly blamed, but the reps were also critical of the attitudes of some apprentices:

Rep: “They’re being sent there because you’ve got the two additional years of schooling that you have to do now. They come to you and say, ‘I’ve been told I’ve got to come here otherwise my mum loses her benefits.’ When I was an apprentice, you had to have high level maths to even get considered for an apprenticeship. Now, they’re coming with nothing at all.”

So the general picture was one in which the reps deplored the watering down of trades in which they had themselves invested time and energy to learn the necessary skills. One rep

had refused to accept what he considered an unacceptable lowering of standards as an apprentice trainer:

Rep (Construction sector): *“One of the reasons I left (the training role) was that 80% had to pass. And I thought, ‘Well, I’m not signing off someone that’s not good enough, because that’s my name.’ And that became a big argument, and I said, ‘I’m not doing it.’ And all they did was get someone else to sign them off.”*

Cost was seen as the limiting factor. Reps were opposed to the Government policy of paying for training only up to an NVQ level 2 instead of the more demanding NV Q level 3. They understood that this directly fed into the skill dilution problems they had identified and felt strongly that older workers should be given a role in mentoring and training apprentices so as to maintain skill levels in their trades.

Rep 1: *“I’m really proud that I’ve got proper indentures but, now, they’re coming away, and it’s just a naff certificate. They get their NVQ level two, it’s three months. Get it signed off, £400. If anyone’s got their level three, that’s what? £3,000? £3,500? If you do the proper level three at college with the whole shebang, it’s about £9,000 in total.”*

Facilitator: *“Do you think that older workers could have a role in terms of mentoring and training the younger ones?”*

Rep 1: *“Yes, definitely. They should do. But not all of them are going to...”*

Rep 2: *“That’s a cost. No one wants to pay for these older people to pass on stuff they learned years ago. When these lads did their apprenticeship, there were probably three bricklayers for each apprentice. They were stuck with those three bricklayers, and those three bricklayers passed their knowledge on. Now employers don’t want those three bricklayers wasting their time talking to some young apprentice. They want those three bricklayers out there laying bricks.”*

17.4 Government policies on ageing workforce and retirement

As our desk research described, a key driver in the promotion of active ageing policies and practices in EU countries has been the adoption of policies by the European Union and its member states. How far did managers and union reps respectively understand these top down policies and practices?

Table 12: Assessed understanding of government policies on ageing workforce and retirement (management)

Italy	No Comment
Poland	Modest
Spain	Low
UK	Modest

Comments on government policies on ageing workforce (management);

Spain: Our researcher noted a very low level of understanding of these sorts of policies by managers. Specific points about relay contracts and partial retirement appear to have caused difficulty, principally because in practice the intended policy outcomes proved not to be achieved. Researcher's comment: "Partial retirement has not fulfilled its original function as a facilitator of knowledge transmission within an active ageing framework nor as a promoter of young workers' hiring by corporations. This type of retirement has provoked important costs to the pension system and it has been used as a resource for early retirement and rearrangement of the workforce."⁴

The foregoing observation is echoed by our workshop evidence.

Line manager (private sector, workshop): *"Partial retirements have not worked in our company. I mean, there was an option, a choice that had to be made. The employee had to either work the partial retirement time continuously or, for example, it was done in just two months every year. Those who chose to do it in two months a year, well, neither the work they provided to the company was acceptable nor was it satisfactory for them to have to come back"*.

Italy Employers expressed the view that the policies adopted by Government on the subject of workforce ageing and retirement were, '...what they expect from the Government.' Our research partner comments; *"They wanted tax rebates to incentivise hiring of older workers, basically because it is a cost to hire and re-train them. They want compensation for what they see as the costs which older workers imply for the business. They take the Government's policies for granted and didn't comment on whether they liked them or not. Cost is the issue. Reduced levels of state insurance contributions are already applied for hiring older workers (over 55) are applied but the employers said they needed more to make a difference. As things stand, the cost/opportunity does not influence them to change their hiring and HR practices to specifically support older workers."*

Poland Employers in Poland reported the difficulties caused by fluctuating public policy in relation to pensions and retirement. (However, this was not simply a question of *understanding*, but rather the problems of uncertainty and confusion caused by rapid shifts in public policy.) The raising and subsequent lowering of retirement age was cited along with the fact that just as retirement ages were lowered, the Ministry of Labour, Family and Social Policy was setting out to convince people that just because they *could* retire, they didn't really *have* to do so! The result was that people were not clear about the case for working longer and in most cases, retired as soon as they were legally entitled to do so.

⁴ Quílez, 2014, p. 221 Spanish desk report, (p. 24)

UK: There was a good understanding that state pension and employer pension ages are rising and that members, particularly younger workers were going to have to work longer. The detailed logic behind the policy was not necessarily fully understood but there was a strong recognition that this would have implications for older workers particularly in arduous jobs.

Table 13 Government policies on ageing workforce and retirement (union reps):

Italy	Modest
Poland	Modest
Spain	Modest
UK	Modest

Comments on aspects of governments' policies on ageing and retirement (Union reps);

Spain: The Spanish research partner highlights the issue of partial retirement arrangements, which have been tried in Spain and not found to be entirely satisfactory.

Researcher's comment: *"Partial retirement has not fulfilled its original function as a facilitator of knowledge transmission within an active ageing framework nor as a promoter of young workers' hiring by corporations. This type of retirement has provoked important costs to the pension system and it has been used as a resource for early retirement and rearrangement of the workforce."*⁵

Italy: Union reps understood the policy of extending working life but did not propose any changes to make the policy more acceptable.

UK: The aim and scope of government policies in response to the ageing of the workforce was explained, but did not form the basis of any deep discussion in the workshops. It appeared that reps accepted the fact that the policy "was as it was", though the implications in terms of the requirement to work longer particularly for workers in gruelling occupations, were strongly challenged.

Comments: As the above sections make clear, there are many issues around all of the chosen subject areas in respect of which there are knowledge gaps and some misunderstandings. That said, it is clear that both union reps and employers have a high degree of specialist knowledge in certain areas, notably in the field of apprenticeship training, as well as defined views and opinions in relation to most of the issues. An obvious need appears to exist in clarifying the areas of ambiguity through appropriate training, directed towards both union reps and managers.

⁵ Quílez, 2014, p. 221 Spanish desk report, (p. 24)

18. Positive action to promote active ageing

Members of the research partnership commented on how far employers had, in their estimation, accepted the importance to deal with matters of active ageing at corporate level. The following table summarises assessments. More detailed comments and quotes are shown below:

Table 14: How far do Employers accept necessity to act to deal with matters of active ageing? (Assessments by researchers based on participants' contributions in their workshops)

	High acceptance	Modest acceptance	Little acceptance	No acceptance
Italy			X	
Poland		X		
Spain	X			
UK		X		

Spain: Some Spanish employers seemed ready in principle to change, thinking of adaptations that might serve to delay retirement, changing the attitudes and levels of motivation of older workers. The following workshop quotations express this.

Manager (Public Sector workshop): *"... what is clear ... I think we were all in agreement on that thing: delaying the retirement age per se is not enough. It is necessary to think about adaptations, ways to adapt to this delay so that this is possible"*

Manager, (Private Sector workshop): *"So far, what we were thinking was, neither the company nor the elderly or the worker wants to be here after a given age. We both [managers and workers] have to change our mind-set. It is not only that we must motivate workers so that at 63 years of age they feel ready to keep going, but the company also has to accept that it will have workers 63 and more years old."*

Italy: Employer Representative (Rome Workshop 1) *"Active ageing is not a priority for the employer association he represents"*

Poland: Awareness of the case for active ageing was reflected in contributions made by participants in the Polish workshops. From the employers' point of view the case was embraced in recognition of the "challenges" to be overcome in order to achieve active ageing. These took the form of changes in the labour market:

Employer rep (Lodz Workshop): *"...in addition, changes in the labour market pose a huge challenge we are struggling with."*

Employer (Falenty Workshop): *"Currently, though the labour market is changing, a good professional, whether older or younger, is employed."*

Employer (Lodz Workshop): *"... we are doing our best trying to encourage these employees in all possible ways. The pension plan was also supposed to be one of the goals. It is also meant to encourage new employees."*

Participants spoke of generational awareness and cultures. One employer representative commented on the challenges when the workforce became increasingly age diverse with three or more generations working in the same workplace. Another hinted at a problem of stereotypes of older people obscuring a real understanding by managers of their potential to contribute to the organisation.

Employer rep (Pracodawcy RP): *"The main barrier is the lack of a generational awareness – the understanding that older workers can bring much to the organisation including a lot of added value. They may have the idea that when one approaches retirement age, he should just wear slippers and sit on a rocking chair with a pipe. I think that in many places, such ideas dominate. There is a stereotypical idea that an older generation employee is not able to learn, does not want to learn, does not adapt and is not flexible."*

Another employer commented on the fact that the older generation is:

Employer rep (Pracodawcy RP) *"...a very valuable generation. They tie up with the employer and are emotionally loyal. They respect their work, may be very attached to it, and despite the fact that in our environment, an elder is often perceived quite stereotypically, they really put a lot of effort into their work."*

Employers emphasized not only the necessity of an active aging presence in the organisation or broadening the employees' awareness, but also the need to set good examples ("...the example comes down from above," as one employer commented).

An employer spoke strongly in favour of setting good examples.

Employer rep (Pracodawcy RP): *"I believe in **doing** instead of speaking. I think that the nicest and the most beautifully told words of 'how something is going to look', can change nothing until at least small steps are implemented."*

Another recognised the importance of winning support from the Board to make changes.

Employer Rep (Pracodawcy RP): *"The best practices that you can come up with are worth nothing unless there is some understanding, for example in the management board."*

UK: The evidence of our workshops was mixed. On the whole there was a positive interest and commitment from employers to deal with ageing workforce issues at company level by the adoption of suitable policies. However, this interest covered a wide range and there was no single position that could be said to characterise all employers. Some employers, for example in the financial services sector, have recognised that there is a "business case" for supporting older workers and have adopted measures emphasising recruitment or retention of

older workers, thereby allowing the company to present a broader range of ages in their public facing functions.

More broadly, the employers' network, *Business in the Community*, which supports various corporate social responsibility campaigns among employers, has been working closely with the Government Department for Work and Pensions to support its *Fuller Working Lives* campaign, targeting employers and encouraging them to "recruit, retain, retrain" older workers. (The *Fuller Working Lives* programme is part of a broader, long term programme by the Government, which has been reaching out to employers and voluntary groups to encourage them to *extend working lives*. The policy in turn has been driven by the growing population of "older old" people and the desirability of maximising the economic potential of the country's ageing workforce.)

The employers at our workshops came from a range of disciplines, but in the main were HR specialists of some kind. Participants in our Humber LEP workshop had a particular interest in workforce recruitment. With this in mind, one company had explored policies to encourage a broader range of individual applicants for jobs, including older people. The example of Barclays Bank was a case in point. Here, a wide range of policies supportive of the older worker have been adopted, including a well-publicised pilot scheme for older apprentices.

Generally, our employers were sensitive to their legal duties to avoid age discrimination. Despite this, an employer representative conceded that formal policies of companies may not necessarily be reflected at all levels in organisations and that the formal adoption of good corporate level policies to deal with ageing workforce issues could still leave scope for negative practices at lower levels in the organisation.

Employer (ENEI): *"Although I think that many—certainly, larger organisations have now got pretty age-proof policies in place, it's still difficult for them, and they have made a lot of effort to train their recruitment teams, for example to avoid age bias. They will only use reputable employment agencies or recruiters. It's still difficult to unravel the sort of stereotyping that's going on... I think there are a lot of employers who are age neutral. I don't know of any organisations who have gone to the point where they will say we're actually going to take what's called in the UK, "positive action" in terms of providing or improving accessibility for older workers to employment prospects."*

However, some employers were adopting policies to support *existing* older workers, though few had been planned strategically to address workforce ageing. Few if any had extrapolated their age positive policies to embrace a potential future, older workforce. (None had formulated a fully blown "age management" action plan.) That said, a few individual HR managers, were seeking to understand the "business case" and come up with ideas.

HR Manager (Medium sized not for profit organisation) London Webinar: *"I am interested in the whole workplace well-being narrative. The way things are going we are all going to have*

to work a lot longer. Seeing as we spend so much time at work, it is becoming imperative that this kind of social dialogue to happen. However, I am not sure that my organisation is fully on board with this. Maybe the topic has to be raised for senior management to become more aware of it."

19. Recognition of Business Case for Active Ageing

Researchers gave their assessments of the degree to which line managers in their interviews and workshops recognised the 'business case' for active ageing. The following table summarises these assessments.

Table 15: Understanding by managers of business case for active ageing (Assessments by researchers based on participants' contributions in their workshops)

	High acceptance	Modest acceptance	Little acceptance	No acceptance
Italy	X			
Poland		X		
Spain		X		
UK		X		

Quotes and evidence on business case:

Spain: These managers appear to be struggling with the realisation that active ageing and extending working life entail a series of complex challenges to do things differently. They talk of motivation of managers and workers and "doing things differently." No one refers to "the business case," but it seems clear that they accept it.

Manager (public Sector workshop): *"... what is clear is what we have said, I think we were all in agreement on that thing: delaying the retirement age per se is not enough. It is necessary to think about adaptations, ways to adapt to this delay so that this is possible."*

Manager (Private Sector workshop): *"So far, what we were thinking was, neither the company nor the elderly or the worker wants to be here after a given age. We both [managers and workers] have to change our mind-set. It is not only that we must motivate workers so that at 63 years of age they feel ready to keep going, but the company also has to accept that it will have workers 63 and more years old."*

Italy: Italian managers appeared to see the "business case" for active ageing, very much in terms of the necessity to maintain the pace and productivity of the workforce, with implicit assumptions that older workers tend to suffer decline in work speed and productivity.

HR Manager (Rome workshop 2): *"Active ageing is an issue because the working population is aging rapidly, particularly, in the most important parts of the production cycle."*

HR Manager (Rome workshop 2): *“The topic of active ageing is related to labour productivity: the more workers get older, the more their performance reduces. From an HR management perspective, active ageing should primarily consist in ensuring that the aging of working population does not lead to a decrease in productivity or to an increase in labour costs related to absenteeism due to health problems, replacement costs and so forth that is not compensated by productivity growth”*

Poland: Employers emphasized not only the necessity of active aging presence in the organisation or broadening the employees’ awareness, but also the need to set good examples (“The example comes down from above”, as one manager put it.)

Employer rep: *“From the organization's point of view, I think that a comprehensive perception of employees is important. I believe in doing instead of just talking. I think that the nicest and the most beautifully told words of how something is going to look like, can change nothing until at least small steps are taken.”*

Employer rep: *“The best practices that you can come up with are worth nothing unless there is some understanding for example in the management board. I think that this is important but I also see that for example small employers in one-man businesses where the boss owns the company with, let’s say, only a few or up to twelve people, in these organisations such employee centred activities are completely omitted, or there is even no such thinking.”*

UK: While UK employers in general are not thinking holistically or strategically around older workforce issues, some HR leaders are keen to pioneer new approaches. In specific organisations, a “business case” argument is being developed, which in turn may gain “buy in” to ageing workforce strategies at a senior level. In our employers’ webinar an HR professional (who had been acting as a freelance consultant to other employers) commented:

Employer, London Webinar: *“I am looking for information and an evidence base in order to sell the concept to senior leaders in their organisations. Until people really start to feel the pain and see how demographic changes are going to impact on their ability to have the kind of organisation they need, there won’t be changes. Senior management need to understand the impact of demographic change on their position in the market place otherwise we are not going to see changes. And I would like to try to land some with people who are in charge of well-being and diversity because even in organisations that are quite good on diversity, they are not generally so good with older workers.”*

An individual representing a small new start-up company in the IT sector, had adopted a deliberate strategy of *seeking out* older workers to recruit as a way of getting high value technical know-how into the organisation more cheaply than could otherwise be imagined.

Business Manager (IT start-up, London): *“We are mainly hiring really young graduates coming out of University, which is really what we can afford. These older guys are providing an amazing ability to upskill and develop these graduates without us needing to set up training*

courses, because we have got that kind of experience in house through them. So this has just come through hiring a different type of person really. They were hired mainly because of the experience they can bring to the technology team but we have hired them on a very flexible basis. They can work from wherever they want to work and for the days and hours they want to work. This arrangement has been what has attracted them to join us rather than continuing to work for big corporates.”

Employer (Webinar): *“I think a lot of organisations are beginning to realise that there is a lot to be done. A lot of this is under the umbrella of “workplace well-being” and this is leading on to all these different branches of this subject and definitely the ageing workforce and active ageing is quite crucial.”*

20. Concerns over productivity issues with older workers:

Our researchers were invited to comment on how far they discerned that any failure by managers in their workshops to respond to the needs of older workers, was attributable to short term pressures on organisations to maintain productivity. The following table summarises the extent to which productivity issues were seen as the main reason for inaction.

Table 16: Extent to which Productivity Issues are a Cause of Inaction by Managers to Support Older Workers (Assessments by researchers based on participants’ contributions in their workshops)

	Strong cause	Modest cause	Small cause	No cause
Italy	X			
Poland		X		
Spain	X			
UK	X			

Overall, as it may be seen, there was a strongly shared consensus across the four countries that any failure by managers to respond to the needs of older workers was attributable to pressures to maintain productivity. Quotes and evidence on the productivity issue as a cause of employer inaction to support older workers, are given below:

Spain: A Spanish public sector HR manager argued against making too many concessions in the form of adaptations to jobs or working time to support older workers.

“Many of those agreements, on conciliation, adaptation, are actually... incompatible, you might say, that is, if the measures are not applied very carefully, they are incompatible with the provision of a service with a certain degree of normality”.

Italy: HR Manager (Rome workshop 2): *“The topic of active ageing is related to labour productivity: the more workers get older, the more their performance reduces. From an HR management perspective, active ageing should primarily consist in ensuring that the aging*

of working population does not lead to a decrease in productivity or to an increase in labour costs related to absenteeism due to health problems, replacement costs and so forth that is not compensated by productivity growth”

Poland: Researcher’s comment: This is especially true in SMEs.

UK: The productivity issue would seem to be a major factor conditioning employer attitudes to older workers. In the building sector, workers and employers alike were conscious of the fact that the *pace* of work was important. Being able to maintain the pace of work required to make the job cost-effective, was a fundamental priority.

An experienced Occupational Health Physician: *“The thing that strikes me, having worked in the not too distant past for such organisations as Network Rail and Royal Mail, is that one of the big issues is ... performance management. Older people may not be able to function as rapidly as someone who is forty years their junior, either mentally or physically. I don’t see an awful lot of recognition of that fact in the way employers deal with people in their 50s or 60s. The expectation is that they must perform the same as everybody else. That’s fine but in a physical role you may struggle and end up in a capability dismissal because they can’t keep up. They could probably function at 75% or 80% but their employer can’t or won’t tolerate that and I think that’s because they don’t want to be seen to differentiate in terms of what people do. It is easier for them to apply a blanket rule and say, ‘If you can’t make the cut and knock out a thousand widgets a moment, we can’t use you.’ And that’s easier than justifying differences. Or it’s just because they have got plenty of people who want the job and frankly it doesn’t matter.”*

“... in organisations like Royal Mail, where the Postmen and women nowadays are encouraged to rush around more rapidly than they might have done ten or fifteen years ago anyway...and they sometimes don’t last long because we push them fairly hard. And I say to the organisation, “Can’t we just go a little bit more gently with these guys? They are good guys but expecting them to batter through a thousand cases a day is hard work. You know we could still use them usefully and make whatever financial rearrangements are there to be made but they should be allowed to go a little more slowly than their otherwise peers.”

While business and commercial constraints may leave little scope for a general slackening off of pressure to achieve output targets, the commentator in this case is arguing for social dialogue to re-set production norms for older workers and to find some way of making this commercially acceptable to the employer via a reduction in wage costs in some form.

21. Holding conversations with older workers about retirement

The research team considered how far managers, appeared to be fearful or reluctant to hold conversations with individual employees about their future work or retirement intentions. The table summarises responses. If there is a tendency in some countries for managers to “hold back” on such conversations with employees it was not generally seen that this was occasioned by a fear of legal action or perception of age discrimination. The exception appears to be in the UK, as shown below:

Table 17: Fear or reluctance to hold conversations about age and retirement (Assessments by researchers based on participants’ contributions in their workshops)

	Strong cause	Modest cause	Small cause	No cause
Italy				X
Poland		X		
Spain				X
UK	X			

Spain: Generally speaking, the tone of the conversations in both interviews and workshops indicates that more than fear or reluctance there is unawareness and a lack of orientation about what to do with an ageing workforce.

Poland: Mature employees’ choices are to a certain extent determined by the situation prevailing at the place of employment. The employer, through the organizational culture, methods of communication, treatment of subordinates and motivation may encourage longer activity or just the opposite.

Employer rep (Lodz workshop): *“It depends on the atmosphere in the workplace and what the employer’s opinion. Most people, for various financial reasons, want to stay – now the question is whether or not it is possible.”*

Employer rep (Lodz workshop): *“Most often, supervisors give tasks and these tasks have to be fulfilled. There is no reflection on whether the brigade is older or younger. The supervisor will say, ‘Get it done among yourselves. This is a matter of getting along.’ This approach is a barrier to the involvement of older workers however.”*

Trade Union rep (Falenty workshop). *“The greatest expectations are if those employees who have already lost their health say, ‘we want to leave.’ When they work under stress, have poor working conditions, or carry heavy loads, then all these factors disqualify them and the employer says, ‘I need a strong, fit human with a healthy spine.’ So it is difficult. On the one hand, we understand the employer, but on the other hand, these people lost their health because of 40 years of work.”*

UK: There is evidence that some employers are reluctant to have conversations with older employees about work intentions. The following discussion reveals a level of sensitivity about holding conversations or even asking simple questions of employees about their age:

Humber LEP Employers' Workshop, Employer 1: *"I think that's potentially a barrier because in some cases, you may want to start some kind of dialogue because you see somebody starting to struggle. Well then there's a barrier (about the fear of) discriminating ... So actually, more often than not, the only way for that person (to get help is for them) to come to you to actually say 'I'm starting to struggle' (so that means it is down to the employee to start the dialogue). So actually in some cases having honest conversations might be more helpful, and could have resulted in changes being made."*

Employer 2: *"In our conversation somebody mentioned to me ... the question of retirement and I said, to the guy, 'At what time, or at what point are you thinking of retiring?' And he said, 'You can't ask me about that!' I was only being friendly." (Laughter)....I mean I was just being friendly. I hadn't even considered that I could not speak to someone. It wasn't an official conversation of any kind. It was a passing comment, but how bizarre is that?"*

Facilitator: *"How do you think...?"*

Employer 2: *"Obviously not that long ago, you could forcibly retire someone at what, 65? I think that everything's been changed that much and the people aren't comfortable, with questions about what they can and can't do around their age."*

In contrast, a few companies were adopting new approaches to establish the preferences and plans of employees around the age of 50.

HR Manager (AVIVA insurance company): *"Our company has introduced a pilot mid-life career MOT⁶s for people once they have reached the age of 50, which are designed to discuss the subject of retirement. ... It is intended to send a signal to our people that 50 is not the age of winding down, but is mid-career – you have got another 15 years of good life to live. ... it was driven by a business need. We were conscious of a skilled set of workers that we were fearing we might lose. So we responded by saying, 'We need to retain these people.' ... We are working with the local people on it to get their views."*

HR Manager: *"As well as the mid-life career MOT, we have processes in place so that any job that is advertised in the company is potentially available for flexible working, so this makes it possible for workers of any age who have either a health condition, a disability or a caring*

⁶ "MOT" stands for "Ministry of Transport Test," and refers to the annual tests of roadworthiness that are required of vehicles above a certain age in the UK. Its use in this context as a "mid-life MOT" is metaphorical and implies that the individual's working capacity, physical and mental health and well-being will all be considered in a discussion which is supposed to identify issues which may require attention if the individual intends working longer.

role to achieve a working week that can more easily allow them to continue working, notwithstanding these personal circumstances that might sometimes preclude them from doing so.”

22. Use of early retirement to manage manpower levels

How far did researchers see evidence of employers using early retirement to manage their manpower requirements? The table above summarises responses with comments and evidence shown below. Our workshops suggest a mixed picture of responses, with the UK showing less frequent use of early retirement while other countries appear to be using it more commonly as device to regulate workforce numbers.

Table 18: How far are employers using early retirement to manage manpower requirements? (Assessments by researchers based on participants’ contributions in their workshops)

	Using it a lot	Making some use	Very infrequent use	Not making use
Italy	X			
Poland		X		
Spain		X		
UK			X	

Spain: Union rep (Public sector, interview): *“The only solution that the company where I work can make available to the worker is early retirement ..., dismissal, say, mutually agreed so to speak. (...) I've been in this firm for 25 and the truth is that in our company the only way we have faced the aging work has been through tools for workers to reach retirement age earlier ...”*

Italy: Trade union representative (Rome workshop 3). *“Companies are more interested in hiring young workers as it is more convenient from an economic point of view and also because those workers are more flexible at a physical and mental level. For that reasons, companies are more interested in promoting the access to early retirement than measures to keep older workers active at work”*

Poland: Employer: *“Another issue here is that employers are hiring people who have already retired, left the labour market and are receiving their pension. This in my opinion is very wrong.”*

UK: Early retirement continues to be available (usually as a voluntary option) to some employees in the UK in downsizing or redundancy situations. If given in a redundancy situation, the employee may receive a severance (or redundancy) package as well as an early pension, making it an attractive deal (particularly if they were likely to retire a few years later anyway).

The details of the “package” offered would depend on the employer, and are often covered by a collective agreement if the company is unionised.

Early retirement may be offered to employees who wish to retire early on grounds of ill health. In such a case, retirement may be described as “voluntary,” though in practice, the employee may have little option, particularly if the employee is unable to do his or her job because of health issues. Other than in a redundancy situation, enforced early retirement would probably be unlawful unless there is an employer justified retirement age (EJRA). (EJRAs are rarely used outside the emergency services, but in principle they are open for the employer to adopt.) That said, the risk of being *made* to retire or being made redundant from the job, is still a concern for many employees in times of uncertainty when unemployment and job loss can be hugely damaging. The other side to the coin is that reps were aware that many of their members would not wish or be able to remain in the same job until normal retirement age at 67 or later and might welcome the chance to take an early retirement offer.

Facilitator: *“How do you think your members would respond to the idea of a mid-life review at say the age of 50? Would they welcome this?”*

Union rep: *“I think they would be interested. For example, you would know what age you were going to retire at if you had one. I’d know what was going to happen in ten years’ time; am I going to be able to stay at X or will they try to push me out? Will there be different jobs you can do?”*

23. Technological change and uncertainty

How far have technological changes dominated employers’ abilities to make changes to support their older workers? The views of our researchers are summarised in the table:

Table 19: Impact of technological change on employers’ support for older workers? (Assessments by researchers based on participants’ contributions in their workshops)

	Big impact	Some impact	Very little impact	No impact
Italy	X			
Poland		X		
Spain		X		
UK		X		

Spain: Human Resources Manager (Private Sector workshop). *“This year there have been people who have left, highly skilled team leaders with an expert leadership until now in welding (that it is very important here). However, things have changed. Now there are robots, welding robots and some workers did not want to learn welding. ... If you are not motivated*

to learn, many other positions start to be less interesting for you. You become aware of being clumsy and you even boast about it. And you start thinking, 'well, at my age it makes less sense to be retrained on new technologies'".

Italy: "In capital intensive sectors technological change necessitates continuous skills update. Labour intensive activities are generally associated with lower skills and therefore workers are more substitutable. This impacts on older workers "obsolescence". (Researcher's comment)

Poland: Trade union rep (Olsztyn workshop): *"There is noticeable technological progress, which means that in 20-30 years, quite a lot of professions will disappear."*

UK: Union reps were aware of some of the possibilities and dangers which technology could bring its implications for the ability of workers to extend their working lives. However, there was scepticism that it would be used in worker-friendly ways. In a discussion about the employment of more female workers in the construction sector, one rep commented on the greater gender diversity which could lead employers to use modern, lighter materials in wall building. This could have a beneficial impact on workers of both genders and reps welcomed this opportunity arising from technological change. On the other hand, a discussion about the use of robots and other fourth generation technology makes clear that some union reps have concerns about the implications of technological change. Nonetheless, there was interest in the potential of technology to support active ageing, including in the final quotation below, the suggestion that older workers might have future roles, teaching robots skills in bricklaying and other trades.

Rep 1 (construction workshop):

"Some technology seems to be more about displacing workers rather than supporting them...[On the other hand] I think there's some technology that could actually take away some of the stresses and strains on the body that would be coming in the future. In Germany, you were talking about the automation workshop, where they've got a scaffolding thing that comes in and the scaffolders are not doing all that physicality. It just puts itself up, like, by a pulley system. I mean, that's going to help, but then it's going to drive people out of work. It's never going to balance itself out."

Facilitator: *"What about robots?"*

Rep: *"With drones now... we train them to lay bricks but they just can't go round corners at the moment. But with drones, they can fly over a site and measure it just by using the three points. Three points over a spoil heap, it tells you exactly how much material you need, how many boys you need to do the whole job. It's not just us, it is the managers in the construction industry who will be needed less. It's going to hit the whole industry, not just the manual*

workers. The way that will work well is if, when robots come in and help out with the industry, the retirement age comes down.”

Rep 2: *“It is never going to happen.”*

Rep 1: *“No, exactly, but if you finish work, because obviously the robots are helping out and you don’t need to work so long ..., you’re still going to have to wait until you’re 67 and you’re going to have to fight and try and stay in there, ... struggling every day with body pains and stuff.”*

Rep 3: *“To retire early, you need money. Robots don’t earn any money. They don’t pay any tax, they don’t cost anything...”*

Rep 1: *“It would be a great idea if, as you got to a certain age, you were put first in the line in operating these machines. So, you come off the physicality and you learnt to operate them... Because you still need to have people pass on skills, and that’s not happening as much now.”*

24. Barriers and facilitators – Individual Level

Do specific characteristics of older workers stand in the way of an active ageing approach? In the following tables we will consider evidence for and against the suggestion that the actions of workers as individuals may contribute to success or failure to age actively. Cultural patterns and values as well as numerous environmental factors might conceivably impact on a preponderance (or otherwise) of active ageing and such factors are not easily separated completely from the characteristics of individual workers. The following questions attempt to scratch the surface of this complex relationship

24.1 Workers’ reluctance to discuss plans?

Table 20: Reluctance by workers to talk about their own retirement plans? (Assessments by researchers based on participants’ contributions in their workshops)

	Yes	No
Italy		X
Poland		X
Spain		X
UK	X (Sometimes)	X

Could it be said, for example, that their own reluctance to engage in discussion about retirement plans was a barrier to facilitating active ageing? Our table shows that our research partners found no evidence to support this interpretation. Their comments are shown below:

Spain: Our Spanish research partner reports that workshop participants did not notice any explicit reluctance by workers to talk about their own retirement. However, they commented that there may be some hesitation to go through medical checks when workers feel that they could qualify for a work adaptation leading to a weaker salary and therefore a poorer pension.

Human resources manager (public, workshop): *“There is a refusal to present for that medical evaluation that could serve to prepare precisely this type of [active ageing] policy. There will be people who from a certain age and in jobs that require a high physical performance will have to adapt their jobs and they refuse, they refuse to take that evaluation that would allow workers who are in special physical conditions to be able to adapt their jobs. ... workers arrive demanding the adaptation of the job in certain conditions, and they are asked to go to the medical service, because it is the only way to do it because legally there is no other, they are asked to go to the medical service and they refuse to go.”*

Italy: Our research partner comments: *“In Italy everything is strictly regulated by the law. For low skilled workers you reach the age of retirement and retire. There is therefore no sense that workers need to talk about their retirement plans. Professionals on the other hand are often re-engaged in consultancy contracts.”*

Poland Employer representative (Warsaw workshop): *“Age itself does not matter. High quality jobs are important. However, there are questions about the kind of work activities that are targeted at older workers, for example in the 50+ or 55+ age range. We don’t target activities according to employees’ age groups. Instead, everything we ask them to do is rather complex.”*

UK: There was some suggestion that workers may be unwilling to engage in discussions about their retirement plans owing to fears that being too open could convey the impression that they were anxious to retire. Some of the union reps referred to members having a fear of retirement as they did not feel they could *afford* to retire, even though troubled by increasing demands of the job and progressively deteriorating health conditions limiting their capacity to work. A representative in our construction workshop expressed the problem in this way:

Union Rep, Construction Workshop: *“I think the three biggest issues, that have been mentioned, are the physical demands of the job, ...the precariousness of work and retirement and being able to afford to retire and, in some cases, being forced to work longer in a more precarious situation where you’re not really sure if you’ve got a job from day-to-day. Thirdly, there is the issue of technology which seems to be more about displacing workers rather than supporting them.”*

In short, it was the existence of these objective *barriers* to continued working rather than inhibitions about discussing the future, which (for this rep at least) was the dominating issue.

24.2 Lack of planning to support later life development, career and job changes

Table 21: Absence of planning to support later life career development or job change? (Assessments by researchers based on participants' contributions in their workshops)

	Yes	No
Italy	X	
Poland	X	
Spain		X
UK	X	

How far did reps and employers in our workshops mention a lack of planning to support later life career development or job change? Or to put it differently, how far do employers engage in planning and reshaping jobs so that they are more sustainable both throughout the life course and for older workers in particular? The above table records our researchers' impressions of the extent to which such omissions were standing in the way of an active ageing approach.

Spain Beyond job adaptation we have not identified planning initiatives to support later life career development, much less job change.

Union rep (public sector, workshop): *"I'm fed up with listening to my colleagues, and now you have to go to do a physically harsh task and it turns out that the younger worker, who is the person who is supposed to come with more strength and more energy, does not have the knowledge or the necessary skill to do that job, and in the end it's the older person who ends up doing it."*

Italy There was no sense that the possibility of individuals being allowed discussions on their personal later life career ambitions, was an appropriate subject for collective social dialogue. As our research partner explains, *"When it comes to industrial relations in Italy they are usually talking about collective rights."* It would seem therefore that this is an area where the character and traditions of the Italian system of industrial relations may be having a negative impact on the possible development of changes in management approaches and working conditions, which, were they introduced, could potentially be of benefit to workers.

UK:

There was enthusiasm for the idea that jobs could be changed to support older workers remaining in the workforce. This was particularly evident where workers were complaining of

being “worn out” by the job, in such occupations as ambulance paramedics and building and construction workers. Reps in the construction sector saw opportunities for older workers to be used as an elite skilled segment of a workforce, needed as a result of inadequate craft apprenticeships/ training. They commented that in some instances, the more demanding aspects of jobs were now reserved for a small band of higher skilled, often older operatives. While this did not necessarily meet with their approval, it seemed to provide openings for some workers in the twilight of their careers.

Rep (construction workshop): *“Electricians, you have one or two qualified electricians and the rest of them are just pulling cable and sticking it up. So, we’re watering down the trades, but it’s going to get to a point where the older people are going to retire and there’s no one there to replace them.”*

Rep (NHS Ambulance Service): *“I think if there were alternatives available, if there was some sort of process that would protect your pay and do something about all the physical lifting, shifting, and the shift work, then maybe staff would be staying on at work longer. You know, what are the paramedics going to do? They retire early don’t they? A lot of them go early - before 60 sometimes. And that’s a hit on your pension to take, you know, but that’s what we have to do.”*

Rep (NHS Ambulance Service): *“There are other jobs within the service which we could do. We have people that get the ambulances ready. (We have a 24-hour, 365 days in a year service.) We have to be able to come in and pick up the keys, get in that ambulance and go, from the minute we log on to the last second that we finish on a 9-5 job. And if we go to particularly nasty jobs, sometimes filthy jobs, a lot of equipment used, body fluids, blood, sick, whatever, we have to be able to go back and just say “There’s the keys,” and there’ll be another ambulance ready for us to get in and go. Our role doesn’t exist if they don’t make the ambulance ready. But if you’ve got people with that knowledge and who know the inside of an ambulance better than anyone, why not use them? If someone gets to the point where they say, ‘I can’t do the lifting and the shifting and the chest compressions and the going out and the kneeling down and lifting people,’ this would be an ideal ‘step down’ job for them. But these jobs are contracted out to another organisation, so unfortunately this option is not available.”*

24.3 Workforce segmentation as a barrier to working

Researchers shared views on whether segmentation of the workforce was a barrier to the continued employment of older people. (Dimensions of segmentation offered included, gender, skills/qualifications, agency/contingent workers.) The table below summarises responses to the question of whether such forms of segmentation are indeed such a barrier. The comments following the table elaborate responses for Spain and the UK.

Table 22: Were systems of workforce segmentation a barrier to the employment of older people? (Assessments by researchers based on participants' contributions in their workshops)

	Yes	No
Italy		X
Poland	X	
Spain	X	
UK	X	

Spain: Our Spanish workshops identified seasonal working and the different hiring patterns arising from seasonal contracts as the main vector of segmentation of the workforce. Seasonal workers have their own reasons to be cautious about taking “complimentary work,” (alternative employment out of their main employment season).

(Human resources manager (public sector workshop): *“We have identified a concern among contingent workers who may be employed in seasonal working of some kind. Their hiring periods in the company are at best four to six months – they are hired only for the duration of the season. A large part of this group does not get engaged in complementary employment outside the season because they have a certain irrational fear of losing their seasonal job. Then we understand that part of the reluctance of these workers to apply for secondary jobs is that they will have to pass a medical examination and they fear that if they fail it, they may also find their seasonal jobs are jeopardised. They are, in the main, people of a certain age and in jobs that require a high physical performance. If they were to fail their medical examination, one could argue it would be better to adapt the jobs or the physical conditions so that they would be able to work.”*

UK: Segmentation of the workforce was not strongly commented upon as an issue obstructing discussion of an active ageing agenda, though it might be presumed to be an influential factor affecting the life chances of many workers' ability to work longer. Ambulance paramedics were particularly concerned that newer entrants to their occupation tended to be university educated and had access to career pathways which led them out of the physical, high stress work of the mains-stream ambulance paramedics, whereas the older, less well qualified paramedics were denied these opportunities. They saw this disparity as unfair and unsustainable and were critical of management for failing to provide an equality of opportunities.

Rep (Ambulance Service): *“They are...you know, the kids that are 20 years old will not be there in 10 years' time. You'll be lucky if they're there in five years' time because they are not seeing it as a career. The likes of us, the 40 plus, you're not looking to go anywhere else, but you know that your body can only take so much. These kids that are 20 ... they become paramedics and they're already thinking of the future. They're already thinking that they can go and work in*

the minor injuries unit on Monday to Friday. They don't work nights. And the pay, again, because minor injuries units are run by private companies, it's not an NHS company. It's very much geared towards the money side of it. So, the turnover of staff... you haven't got the longevity anymore."

25 How social partners saw active ageing

How did the social partners in each country see the overall idea of active ageing? Is it a well-received idea or are the social partners sceptical towards it? In this section we will try to compare the attitudes and values of participants in our workshops in the four countries, on this issue. Bearing in mind that we are dealing with different countries with different frameworks of employment law, traditions and cultural values and systems of industrial relations, comparisons may prove challenging. Coarse grain generalisations may nonetheless be of some value in understanding inter-country differences.

Table 23: How did the social partners in your country see active ageing? (Assessments by researchers based on participants' contributions in their workshops)

They were:	Spain	Italy	Poland	UK
Opposed to the basic ideas				
Indifferent to the ideas	X			
Not familiar / showed no interest				
Indifferent but showed interest once basic facts had been explained	X	X		
Somewhat knowledgeable already and interested to hear more	X		X	X
Strongly knowledgeable				
Keen to be proactive	X			X

Members of our researcher partnership reported on what they took to be the perceptions or vision of social partners in relation to active ageing. Responses are given under headings selected from the offered list shown in the above table. Additional qualifying comments have been made in some instances (see below).

Spain: Our research partner reports that an active ageing culture linked to the workforce and the work environment does not seem to exist in Spain as yet. Whilst the following comments from employers show a degree of ambivalence (and occasionally scepticism) towards the idea of active ageing, invariably this is mixed with recognition of the need for active ageing policies and an interest in pursuing the issues.

Employer (private sector, interview): *“In the different companies I do not know if active ageing is being implemented or not, or how they do it, or if they do it in a natural way, as I understand that things have to be done ... but if you ask me and I have to be realistic, I think right now, the unions don’t have active ageing in their roadmap. Why? Because there are other things that have a higher priority for them than active aging. That is what I understand. It is true that there are unions that begin to introduce active ageing in their language. This is also true. But I think we all have to believe in active ageing, because if we do not believe it ... everything is fantastic on paper, paper supports everything, but that has to be translated into real policies.”*

Human resources manager (public sector workshop): *“There are companies where there has been and I have seen, I insist, where there has been a culture [around the ageing of the workforce], which also requires a very high consensus, to make pathways and itineraries for those workers who are in the final stages of their careers.”*

Human resources manager (public sector workshop): *“This [active ageing] is a question that is emerging at this time and therefore if there are countries out there that have a long tradition in this matter, because they are more consolidated, we could use their tradition very well.”*

Human resources manager (Public Sector workshop). *“The lack of culture. It is now that we are considering the ageing of the workforce. Because until now it has not been an element that was on top of the table. This element appears precisely now that we have this older workforce. [What we must do] It is to create that culture, that people have the culture of active aging and put this culture at the centre of our claims. Both, unions and employers have to take this seriously.”*

Not unlike the employer representatives, the Spanish trade union representatives showed openness to the ideas of active ageing, though they admitted they had started from a low base of awareness.

Union rep (Private Sector workshop): *“When you are involved in the workshop you see the perspective, you see the reality that it is coming. Yes, it is true, the workshop makes you think that it is going to happen [the ageing of the workforce], and that we have to analyse and think how we can tackle it ...It has made me think, I have to have better conditions. I have to have a motivation that it is almost always economic, but I have another motivation, which is that they recognize my work in this company and therefore I may continue to teach those younger workers. If we pay attention [to active ageing] surely there are enough reasons to think about it. However, it's true, we're not educated yet [around active ageing], and that is the first problem with this issue.”*

Union rep (public sector, interview): *“Active ageing is a topic that we are starting to talk about but not at the convention table, but as something like ... in the corridors, you know what I'm saying? Some people say ‘Active ageing is something that we would have to see how to do it, how we do it ...’. Of course, companies face the problem: what do we do with this older worker?”*

Union rep (Private sector workshop): *“I think that the good practice [on active ageing] has already started. We have started to analyse us [in terms of what we are doing with regard to active ageing]. I think the best practice is to understand at least the ASPIRE project.”*

Italy: Trade union representative (Modena workshop) *“Responding to the needs of this segment (older workers) of the population represents an additional problem but at the same time it can also be an opportunity to include new provisions in collective agreements, for example, work-life balance, smart working and different modalities of flexible working”.*

Poland: Members of a mixed workshop of union reps, and a former manager highlighted the important role of work in supporting active ageing, mentioning helping those who were without work to regain employment. One commented, *“You have to raise the awareness of the decision makers and the media on the importance of work if you want to encourage people to age actively. I would like to highlight the position of the young retirees – people who retire in their fifties. Helping them to find employment is very important.”*

UK: Some of the social partners seemed to pragmatically accept the idea of active ageing as a necessary corollary of Government policies to raise state pension age. Ideas included changing conditions in which people worked so that work and ageing were more sustainable. On the other hand, while building and construction sector reps commented favourably on a decline in numbers of accidents in their industry they were very aware of continuing unhealthy practices which were likely to impact on the long term health of those working in the industry. Their attitude was not one of opposition to the idea of active ageing *per se*, but embodied a strong element of scepticism as to whether active ageing was possible given the health effects of their work.

The attitudes and views of reps varied somewhat by sector. Overwhelmingly, they were keen to hear more about the kinds of remedies, adaptations and interventions that would be possible. In construction, examples were given of health and safety interventions which reps would like to see and the impact of technological change and greater gender diversity in their industry. In the finance sector, reps were concerned about rapid changes in the industry – processes and procedures changing at a rapid pace – and the problems of older workers adapting to these, while employers seemed to make little allowance for the differences in rates of learning and skills acquisition and were unwilling to adjust the required levels of output for individual workers to take account of individual differences. Reps in the

NHS Ambulance service were acutely aware of the problems of working under high pressure with long hours, stress and shift working being additional factors in making their jobs unsustainable and were particularly conscious of the personal development divide between older and younger workers, with younger and better qualified workers had many more opportunities to exchange their physically and mentally stressful jobs for more sustainable work.

26. Support for elements of active ageing agenda

Our researchers assessed the “state of play” over active ageing in their respective countries, based on the evidence of their interviews and workshops, with particular regard to the support or otherwise of social partners for elements of the active ageing agenda. The following tables and comments explore this issue further.

26.1 Acceptance of the active ageing conceptual framework

Table 24: Did social partners believe that the idea of “active ageing” had value as a conceptual framework? (Assessments by researchers based on participants’ contributions in their workshops)

	Spain	Italy	Poland	UK
Assessments by researchers based on participants’ contributions in their workshops	agree	agree	agree	agree

Quotes and comments on proposition that “active aging” has value as a conceptual framework:

Spain: Our Spanish research partner comments on the following quote that it is, “...unique since we only met one company claiming to have an active ageing model. In this case the explanation is that the company was itself involved in the sector of caregiving to frail elderly people. While in general terms, the tone of the comments and reflections were prone to acknowledge the importance of older workers and pay close attention to their needs, specific and elaborated comments on the active ageing conceptual framework were scarce.”

Italy: Trade union representative (Rome workshop 1) *“There are two typologies of ‘active ageing at work’ policies: those which support older workers in the transition to early retirement in order to promote the intergenerational exchange and those active policies at work aiming at promoting an adequate permanence of older workers in their job position. There is not only one concept of active ageing as there are three different typologies of age: biological age, functional age and perceived age.”*

Poland: An employer (Olsztyn workshop) commented that there needed to be a distinction between calendar age and biological age, as the two were not always aligned. *“A person who is physically active and intellectually active will always be younger.”*

UK: While social partners found the concept of “active ageing” helpful, it should be stressed that its framework was not previously understood by them in any developed way. Union reps and employer representatives were not familiar with the term “active ageing” but seemed happy enough to use it. Some employers had an interest in pursuing changes in discrete areas such as talent management and recruitment, managing performance, learning and health and well-being and other elements of an active ageing framework. That said, most had not adopted any broader, integrated approach. The term “active ageing” did not appear to incur opposition but there was rather a low level of current understanding of it.

26.2 Is “Health” seen as important in active ageing framework?

Table 25: Acceptance of the idea that ‘health’ is an important part of the active ageing framework (Assessments by researchers based on participants’ contributions in their workshops)

Spain	Italy	Poland	UK
Agree	Agree	Agree	Strongly agree – but not the whole story

Quotes and comments on evidence in relation to health as part of an active ageing framework:

Spain: Health is considered a part of the “quality of life at work” framework (one that it is not necessarily linked to the ageing process) but not a part of the “active ageing” framework as of yet. However, during the workshops and interviews it was often argued that attention to health and legislation about health care at work might be a good start to introduce the “active ageing” framework in the workplace.

Human resources manager (Private Sector workshop): *“At the age of 60 our workers arrived in very weak health conditions, they looked like elderly people, absolutely old. Since then, health has been improving because jobs are being adapted very much and any job that is considered painful is going to be restructured to remove excessive arduousness.”*

Union rep (Public Sector workshop): *“I was thinking that as we have a tool that is the regulation on occupational health, and the truth is that we have always had it ...maybe this tool is underutilized and it would be interesting to take it back as it is already integrated in the labour relations. It might be a tool to facilitate communication with the company... to begin to*

set up regulations on aging, to facilitate the emergence of habits of negotiation on the ageing of the workforce.”

Italy: Trade union representative (Modena workshop): *“Work-related diseases affect worker’s capacity to do some working tasks. From this point of view, population ageing has also an impact in the occupational health and safety management as specific PPE are needed.”*

Poland: Employer (Olsztyn workshop): *“Physically active people show on television that they are active, they are open, they have their passions, they serve the family.”*

UK: Social partners were seen to be in strong agreement with this statement. There were however, numerous expressions of need around other issues than health, making it clear that reps did not see health as a “silver bullet.”

Housing Association Manager: *“I am interested in the whole workplace well-being narrative. The way things are going we are all going to have to work a lot longer. Seeing as we spend so much time at work, it is becoming imperative that this kind of social dialogue to happen. However, I am not sure that my organisation is fully on board with this.”*

26.3 Is “Working” seen as central to “active ageing”?

Table 26: Is working is central to “active ageing”? (Assessments by researchers based on participants’ contributions in their workshops)

Spain	Italy	Poland	UK
Disagree	Disagree	Agree	Agree

Comments and quotations on working as central to active ageing:

Spain: Our Spanish research partner commented as follows:

“In general, the accepted idea is that active aging is linked to the well-being of the person and that this well-being does not always correspond to keeping working. Therefore, the current context invites more to connect active ageing aging with working less than the opposite.”

The comments of social partners appeared to accept the idea of working being a component of active ageing but were nonetheless somewhat equivocal:

Employer (Private Sector, interview): *“Employment, I believe, is a way to stay active and alert at all times and grow old in a way, I would say, perhaps, with better capacities. However, on the other hand, I understand that active ageing does not have to go hand in hand with employment; a person who has finished his working life can age very actively without having to be in the labour market.”*

Union Rep (Public Sector, interview): *“... right now when a person reaches a certain age what companies are trying to do is take him out of the way and hire younger people. ...the tendency is that someone does not get older while in the labour world.”*

Italy: Employer’s representative, Rome workshop 1 *“The point is to implement active ageing policies at 360 degrees as active ageing does not regard only the traditional employment contract but it refers also to other aspects, for example, volunteering. It is important to keep older people active in the society.”*

Poland: Trade Union Rep (Falenty panel): *“Many people who retire do so to rest and they simply do not want to work.”*

UK: The ability to remain in work was the main focus of our discussions but there was some acknowledgement that active ageing also applied to things beyond work. There was strong agreement with the idea that people should be *allowed* to work as long as they wished, with only a few union reps voicing the idea that there was something anti-social about extending working life, on the basis that it might deprive younger people of work opportunities. There was also recognition that working in later life was to some extent a matter of “horses for courses,” a good idea which may not suit everyone.

It was clear that working later in life would only be possible if people were protected from working conditions which wore them out or which made them unemployable in new jobs where technology and methods had moved on whilst the older worker had stood still. There was also recognition that people should as far as possible be able to continue in later life to contribute to the wider society and pursue hobbies, care for their families, act as mentors, play useful and active roles in their union and do other such things which would not count as paid work but which would contribute to the greater good of society.

26.4 Is retirement seen as a loss?

Table 27: Did employers and reps agree that the retirement process inflicts a sense of loss on individuals as they give up work? (Assessments by researchers based on participants’ contributions in their workshops)

Spain	Italy	Poland	UK
Yes	Yes	Probably no	Yes

Comments and quotations on retirement being experienced as a loss:

Spain: Researcher comments - Even if we could not say that the idea of retirement as loss has been presented in the majority of our interviews and workshops, social partners are aware of that linked to retirement. That said, whenever the feeling of loss has been mentioned it has been acknowledged that neither employers nor trade unions do anything to prevent it.

The following observation by a union rep, highlights the experience of loss by retiring workers:

Union rep (Public Sector, interview): *“In most cases, when they retire early, at least it is the experience that I have with the people that I see around me, they tend to break down. They do not react when they are fired, when the employer gets rid of them. All of this is something that affects them very negatively in their personal life.”*

Italy: Trade Union Rep (Rome workshop 3): *“Considering that retirement does not represent the end of active life, work would certainly help older people’s psychological well-being. Keeping a large part of the Italian population active in social, political and cultural participation would have good implications for wider society.”*

Poland: Trade Union Rep (Olsztyn) *“A minority – a definite minority of people (from what I know) are those passive people who just want to have a cup of coffee, a tea, a cookie....”*

UK: This was not explicitly tested in the UK workshops, but was implicit in some of the comments we heard, citing individual cases where retirement had been unexpected or unsought.

26.5 Is active ageing seen as broader than working on?

Table 28: Did employers and reps agree that active ageing is broader than working on in later life? (Assessments by researchers based on participants’ contributions in their workshops)

Spain	Italy	Poland	UK
Yes	Yes	Yes	Yes

Spain: Generally speaking, in Spain the idea of active ageing is mostly linked to maintaining the well-being of retirees instead of still-at-work people. In 2012 a survey of a sample of people aged 50-69, concluded that 61.7 per cent of interviewees would not have kept on working even if a suitable opportunity had been presented to them. In general, work and ageing (in the sense of extending work beyond retirement age) are not two paired terms for Spanish people, neither are work and active ageing.

Employer (Private Sector, Interview): *“Normally active ageing has made me think not of people 50 years old but of much older people, right? [Active ageing] was about how to get to older age, to older age’s maturity, when you’re almost out of the labour market, it is about how to keep yourself active ... that’s what I get, that’s what I understand by active ageing.”*

Italy: Trade union representative (Rome workshop 1): *“The concept of “active ageing” does not include the specification “at work”. The explanation is that active ageing is not only about work. Not all active ageing policies are related to work. Active ageing is also about keeping active older workers that have abandoned the labour market. Active ageing outside work is related to the importance and the role of older people in the society and it has important consequences, particularly regarding social services”*

Poland: Participants saw active aging in broader terms than simply remaining in work, though the examples given in workshop discussions all related to working in some form. A particular issue was the position of workers who had retired, claimed a pension and carried on working, often in self-employment or consultancy. Employers differed in their attitude towards such individuals. Employer representative (Warsaw Forum meeting): *“I think it is wrong for us to be employing people who have already obtained their pension rights and been expelled from the labour market. This to me is a very wrong attitude.”*

Trade Union Rep (Lodz workshop): *“If the company can part company with an employee on the best terms, then the employee will later become the employer’s advocate.”*

Employer (Olsztyn workshop): *“Now, we should be happy to help this man, who has departed his job, to set up his own business. He went on a pension and now he has all the prerogatives to set up his own business or to reconstitute employment and the employer should not be offended. More so because, if he works for us we will only pay health insurance for this employee.”*

UK: There was broad agreement on this wider dimension of active ageing, though it would seem to require greater articulation.

26.6 A gender dimension to active ageing?

Table 29: Did reps and employers believe there is a gender dimension to working in later life with the genders having distinctly different perspectives? (Assessments by researchers based on participants’ contributions in their workshops)

Spain	Italy	Poland	UK
No	Yes	Yes	Yes

Spain: Gender differences do exist when it comes to how people age well, but these differences have not really come up as part of the social agents’ discourse around gender, at least not with the social agents with whom we spoke in our workshops and interviews.

Italy: Trade union representative (Rome workshop 1): *“The most common PPE are those uni-sex and standardized that do not respond to the specific needs of workers, particularly older women. All these aspects should be faced together, it is not possible to speak about gender and ageing separately.”*

Poland: Employer (Warsaw Forum): *“It is difficult situation for a lot of women who are 50-55 years old have been out of work and it is not so easy to come back.”*

UK: Recognition was implicit in some comments but on the whole this was a neglected area.

27. Expectations of “extended working life”

Our researchers assessed the expectations of participants with regard to “extended working life,” giving their observations in response to the following five questions.

27.1 Should work functions, pace and intensity be adjusted for age?

Table 30: Did workshop participants believe older workers should work on the same job functions, at same pace and intensity as younger workers? (Assessments by researchers based on participants’ contributions in their workshops)

Spain	Italy	Poland	UK
No	No	No	No

Comments and quotations: Participants were firmly of the view that extended working into later age should allow for the possibility to make certain changes to the arduousness and physical demands of certain jobs, though there were numerous facets of this question which were explored in the workshops as illustrated below.

Spain: Employer (Private Sector, Interview): *“... it is true that older people would have to change their job posts for more comfortable ones. Because, as I said before, the strength that you have when you are 20 is not the same as in your 40s and it is much less when you reach 50. For me, it is not just a question of strength but of capacity. It would be good to change responsibility positions so that older workers could make less physical effort and get more involved in work management and coordination.”*

Union Rep (Private Sector, Interview): *“I think you have to make an assessment of each person at each particular moment. We are in a sector -the industrial sector- where, really, the sector requires a lot of physical work, there is a lot of muscular wear and fatigue ..., and it is*

a bone and muscle issue. In the end, all of this affects the day to day work... Jobs that have to do with physical effort should be much more adapted depending on age and activity.”

Italy: Employer’s representative (Rome workshop 1) *“Working conditions that imply repetitive tasks and challenging schedules with shifts starting early in the morning affect older workers particularly badly.”*

Poland: Both representatives of employers and trade unions emphasized the situational character of the individual factors which determine whether individuals are able to remain working or impelled towards retirement. They pointed out that most often the decision about leaving employment is made by the employee due to their health, mental and physical condition, opportunities of further earning and ways of spending their free time. They believed that “the employer, through the organizational culture, methods of communication, treatment of subordinates and motivation may encourage longer activity or just the opposite.”

Trade union rep: (Lodz workshop): *“There are people who are very intellectually and physically fit up to 70 years old and there are those who at the age of 60 have problems with memory and concentration....Most often, supervisors give tasks and these tasks have to be fulfilled. There is no reflection whether the brigade is older or younger. ‘Get it done among yourself. This is a matter of getting along.’”*

UK: Union reps generally believed that allowances should sometimes be made for older workers who may be less able to work to the same speed as younger workers or whose physical capabilities had been reduced to some extent. They supported the idea that the design and pace of work should be adjusted for them, although they were sceptical that employers would agree to this. The reps believed that giving older workers the opportunity to transfer into new roles (including mentoring younger workers) would be a humane action and make good business sense. This view was supported by a number of our experts including an occupational health physician and some of the employers.

27.2 Making adjustments for arduous work

Table 31: Participants’ views on making adjustments to alleviate arduousness of work (Assessments by researchers based on participants’ contributions in their workshops)

Spain	Italy	Poland	UK
Both negative and positive views	Negative views	Both positive and negative views	Mainly positive

Spain: In all the workshops and interviews, we discussed the need to adapt work to suit the age and capability of workers - the benefits that would ensue for workers and for the company were pointed out.

Union rep (Private Sector, interview): *“If we want professional improvements we will have to take advantage of the training and experience of older workers. Of course, we will also have to consider job quality for those workers, because physical and mental ageing is a fact. Therefore, we will need to consider ways of helping older workers by them working fewer hours whilst contributing their experience... There could be the possibility of extending working life voluntarily —yes, I am in favour of a voluntary choice, but with possibilities to reduce a large percentage of working hours.”*

However, it was also recognised that making adjustments can sometimes be problematic in terms of work organisation (for example keeping the correct numbers of staff on night shifts) and productivity (ensuring that employee numbers and necessary skills are present in a given context).

Human Resources Manager (Public Sector workshop): *“Many of those agreements, [on the adaption of work] are actually... incompatible, you might say, with the provision of a service with a certain degree of normality. That is to say, if the measures are not applied very carefully, they are incompatible with the standards of work and output levels required.”*

Italy: In Italy, various approaches have been adopted, principally with the underlying purpose of making work more accessible to women workers. These approaches include job rotation and reducing working time. Such approaches are more commonly found in certain sectors including tourism, cleaning and the retail sector, in all of which higher proportions of older women are to be found. Supporting older workers (particularly older women) to make job changes and rotate jobs, are felt to be the likely most effective ways of facilitating working longer.

Poland: While the relationship between remaining healthy and being able to work was noticed in our Polish workshops, there was little discussion on the necessity of making changes to the job to facilitate extended working lives. On the other hand, participants recognised that health issues impact strongly on workers. Fostering more awareness of preventative measures (to avoid ill-health) and introducing such issues into workplace discussions would seem to be needed.

Trade union rep (Lodz workshop): *“Most often, supervisors give tasks and these tasks have to be fulfilled. There is no reflection whether the brigade is older or younger. ‘Get it done among yourself. This is a matter of getting along.’”*

Trade Union rep (Falenty workshop): *“Employees who have already lost their health say, ‘we want to leave.’ When they work under stress with poor working conditions and carrying heavy loads, then all these factors disqualify them and the employer says, ‘I need a strong,*

fit human with a healthy spine.’ So it is difficult. On the one hand, we understand the employer, but on the other hand, these people lost their health because of 40 years of work.”

UK: Views on adapting the job to better suit the worker, were mainly positive but in general it seemed that employers were not proactively initiating changes on their own behalf. Numerous examples were given by reps of situations where management had failed to make adjustments and denied older workers opportunities to adapt to new roles or remain actively engaged with work. The following exchange took place with an occupational health physician who had considerable experience of advising employers.

Researcher: *“Have you seen examples of any concessions that have been agreed to make it easier for the older worker who has slowed down and whose productivity may have declined...?”*

OH Physician (London Webinar): *“No, sadly not. This is why I make the point. I don’t see any evidence that it is being given consideration. Quite the reverse in fact. More often than not I will be dealing with a female work force who are performing roles such as part-time cleaners. Important income for them but physically quite demanding and people with perhaps not great health... As more and more of these roles are being outsourced... and more focus is on getting the job done in a number of hours and making sure that the client is kept reasonably happy, rather than concentrating on whether or not the worker is going to be able to do it... I don’t really see that there is any sign of any movement in this regard.”*

27.3 Did asking for adjustments lead to negative consequences?

Workers sometimes express fears that asking for easier work or work which is more compatible with their physical abilities, may have negative repercussions. We asked participants in our workshops and researchers observing them to comment on whether this possibility of negative consequences was borne out in practice.

Table 32: Did asking for adjustments lead to negative consequences? (Based on researchers’ reports of workshop discussions)

Spain	Italy	Poland	UK
No	No	Not directly, but some employees lose jobs because of poor health	Some did but not widespread

Comments and quotations: As may be seen, such adverse consequences of requesting adjustments were not thought to be commonplace in any of the partner countries, though this did not prevent workers from fearing that they might occur.

Spain: Union Rep (Public Sector workshop): *"A worker who has had a health problem and cannot perform his job is being offered by the company only one way out: quitting his job through permanent sick leave. Then other workers see what has happened and because of that they are afraid to undergo a medical examination that may show their difficulties to do their usual work ... Well, they are afraid that the evaluation of their health could be 'cannot do his usual work', and then the company may fire him, that's the thing."*

Poland: There were no comments about adverse reactions to requests for adjustments, or of fears that such reactions might occur, though several examples of workers who were actually disadvantaged because of health related issues, where an adjustment of some kind to the work done may have benefited the worker.

Trade Union rep (Falenty workshop) *"When they work under stress, poor working conditions, static load, then all these factors disqualify them and the employer says, 'I need a strong, fit human with a healthy spine.' So it is difficult. On the one hand, we understand the employer, but on the other hand, these people lost their health because of 40 years of work."*

UK: In the main, reps believed that management would not be likely to want to "bother" with making such changes, particularly if they were costly. Hence, concerns may have been less to do with being victimised for asking for adaptations but a lower level feeling that it may be unwise to attract attention by asking for changes. In one workshop, responses of management to meet the needs of workers with age related mobility problems were contrasted with the duty laid on employers to make "reasonable adjustments" to accommodate disabled employees.

27.4 Fears of repercussions for asking for help

Even if there was little actual risk of repercussions on an individual worker who might request some adjustment or concession to take into account the impact of work on a specific limiting condition, *fears* of an adverse reaction might dissuade some workers from lodging such a request in the first instance.

Table 33: Did older workers fear repercussions for asking for help? (Assessments by researchers based on participants' contributions in their workshops)

	Spain	Italy	Poland	UK
Question: Did you hear any views in your workshops that older workers may be worried about being pushed out for asking for help to continue to do their work?	Yes	No	No (but they may have had concerns nonetheless)	Some did but not wide-spread.

As seen in the previous section, suggestions that employers may penalise older workers who ask for adjustments to overcome difficulties performing work tasks, do not seem in general to be borne out. Nonetheless, it is possible that workers might *fear* repercussions and therefore hold back from making requests. Our research team's comments are summarised in table 33. Comments are below

Spain: We noted that in some cases, a lack of understanding of active aging and high job instability in some positions, coupled with the need to keep contributing to the public pension system, may lead some workers to *fear* that showing any weakness may put them at risk in front of the company.

Poland: The prevailing view seems to be that if an employee is not able to adequately perform his or her work tasks, they may well face dismissal. Hence, there may well be fears.

Researcher's comment: "Trade unionists noticed that even a very uncomfortable situation, which is the dismissal of an employee, may ultimately prove beneficial to both parties."

This does not necessarily mean that employees are generally concerned that asking for help will result in their being dismissed, but one can imagine that such fears might well exist.

UK: Some union reps made comments which implied that older workers would not generally ask for help (even if they were beginning to struggle with their work) either because of an element of fear on the part of the worker or because they simply did not like to admit that they were slowing down or may not recognise that they had done so. The reasons for failure to communicate their concerns following statement from a rep in the financial services workshop, suggests that fear of management using the "capability procedure" against individuals is a factor.

Union Rep (Financial Services Workshop, Newcastle): *"It is very fast changing. Really fast, the processes can change daily, weekly, and I do find that the older generation... doesn't deal with that as quickly as younger generation....I feel as if it could be of benefit if at some point, on a voluntary basis, when you get to a certain age and you still need the job, if you were able to say, "Actually, hand up, I'm not as quick as I used to be. ...Is there something else I can maybe manoeuvre into?" [Then you could] do it more in the manner of a meeting round a table, "Let's have a chat, what's next for me?" Rather than the way I think Barclays has done it, in our call centre when they are more likely to say, 'Alright, you're not knocking these figures out.' That's an invitation to a capability hearing, because this is the type of stance they'll take. They'll say, 'Okay, your figures are less than this person's. We all take the same calls....' And then they want some kind of an explanation, implying you are not up to the job."*

Facilitator: *"Your experience is that people who might need some adjustment aren't asking for it?"*

Rep 2: *“They’re aware that they’re not as quick, and by the same token they feel harassed, they feel a bit under pressure, and they feel as if they wish they’d retired.”*

27.5 Low key ageism

Many union reps made comments that implied that whatever the law said, ageism had not disappeared from their workplaces and was unlikely to do so. Some reps themselves conceded that older workers were not likely be as capable, in some respects, as younger workers. Whether or not it was explicitly recognised by union reps and employers, some form of low key, implicit ageism seemed a likely aspect of the context in workplaces. We asked our researchers to provide views on this point – did their workshops and interviews suggest such a background context?

Table 34: Does “low key ageism” continue to operate? (Assessments by researchers based on participants’ contributions in their workshops)

	Spain	Italy	Poland	UK
Question: How far did your interviews and workshops provide evidence of a measure of “low key ageism” continuing to operate?	Agree – there is evidence	No evidence	Yes	Some evidence

Comments on low key ageism:

Spain: References to low key ageism existing in some instances, were frequent in our field work. There is, for example, a strong belief that younger workers fight for their own interests disregarding the accumulated expertise and wisdom in the hands of older workers.

Line Manager (Private Sector workshop): *“I have always considered that the people who are older, who have more experience, have opened a pathway in life for me. I have considered them, valued them, respected them and I have taken them into account. However, in our company this does not happen. I feel that the value of the older worker is being lost.... Young people are not capable of assessing the effort made in the past by older workers, nor of transmitting such a positive appraisal to older workers. I do not see it. It is absent, in my point of view.”*

Italy: There was no direct discussion of this issue. However, a provocative question was asked about the fairness of a wage system where older workers produce less and earn more while young workers produce more and earn less. The trade unions’ representative said that this is largely a false problem: it is not necessarily true that older workers produce less and

earn more. However, the interviewee also recognises the importance of wages being based on competency more than seniority.

Poland: Research partner's comment: *"Mature employees' choices are to a certain extent determined by the situation prevailing at the place of employment. The employer, through the organizational culture, methods of communication, treatment of subordinates and motivation may encourage longer activity or just the opposite."*

Hence, there are some workplaces where the organisational culture is "unfriendly" to the older worker and this may amount to "low-key ageism."

UK: The examples below describe a form of "low key ageism," in that obvious needs of older workers to be given some kind of concessions are being completely ignored, in an environment where the pace of work is intense and it is clear that the older worker is struggling to survive. (This discussion and the examples given, are contiguous with the responses given to the previous question).

Rep (Financial Services Workshop): *"Whether you're 15, 16, or 75, you're still expected to hit the targets that are set by the company. The targets are not set for different age groups or levels of experience as such. So, you're all expected to hit that same target range. It doesn't matter how old you are, what experience you have.... You go through what's called a coaching time, so you're given some leeway there but that is it."*

Rep (Financial Services Workshop): *"They don't take into account people's circumstances, whether it's age or anything else. They just look at the bottom line. Is that department hitting that target? Okay, are the people in that department hitting that target? Are the teams in that area hitting that target, and are the individuals hitting that target? So, it doesn't matter what your age is, and if you fail to hit those targets, it doesn't matter how old you are, your manager is going to come down on you because you're not hitting the company expectations."*

In another case, workers in a call centre were dealing with cases of credit card fraud. A group of employees had been given responsibility to handle this sensitive area of activity and all had been put through a short training course on the procedures to follow. Two older workers were slower to pick up the new learning than other younger workers, but instead of putting them on further training, the company put them into call answering roles where mistakes were made, for which the employees concerned were then immediately blamed. The union rep commented that this resulted in their leaving the company early under a cloud of blame, which could have been avoided if the additional training had been provided timeously.

28. Intergenerational issues

In this section we will consider whether our workshops and interviews revealed inequalities and conflicts between the generations. We ask not only how far these may have featured in the workplaces of participants, but whether there are *stereotypes* of the different generations that may be influencing union reps, workers and their managers, if so what they consist of. We were keen to find out too whether there are specific examples of “generational divides” that can be identified and finally, whether on the contrary, there are positive examples of intergenerational solidarity which can inform good practice in working towards active ageing.

Table 35: How important did intergenerational issues seem? (Assessments by researchers based on participants’ contributions in their workshops)

	Spain	Italy	Poland	UK
Not important,				
A bit important,	X			
Quite or very important		X	X	X

The above table summarises research partners responses to the question, “To what extent did your workshops / interviews suggest that intergenerational issues are important among the social partners and workforces in your country?” Comments and quotations are given below.

Spain: In some of the following quotations, intergenerational issues seem to be assuming more importance, with concerns being expressed as to how intergenerational interests can be practically reconciled.

Researcher’s comment: *“We feel that importance and visibility given to intergenerational issues are growing.”*

Line Manager (Private Sector workshop): *“The company is giving a lot of opportunities and space to all these new and younger people who are arriving now, who enter with a hunger to take on the world, who contribute with many ideas, who take very fast decisions, who all seem to do very well,... but there are still older people in the company and we can also give our vision, our experience,... and I do not know.”*

Line Manager (Private Sector workshop): *“The boss is not aware of the situation that you live and work in and I am reluctant to go to the office to say to him, ‘Hey, look, I feel discriminated against by my colleagues who are younger than me and have another way of thinking*

about things.’ I cannot say to him, ‘You are the boss and you are allowing a gap between the generations because we do not understand each other’”.

Human Resources Manager (Public Sector workshop): *“How are the interests of young and old workers to be reconciled in our company? Until now it has been done very little and in a bad way. It is now when you have to start taking things seriously, because otherwise the problem will be very big.”*

Italy: In one of our Rome workshops, the idea was discussed that active ageing should be part of a discussion on the broader dimension of age and ageing. An intergenerational dialogue was the only way to strike a balance that was fair to all generations, according to one view put forward. Reference was made to Italian legislation, the 2016 Stability Law, which has aimed to create stable, permanent work for younger less experienced workers while ensuring that the skills and experience of the older generation were not lost.

How important did these intergenerational contracts seem to have been in the event? For both employers and union they were important but there were problems in their implementation. The ideas had been to create a system to encourage ‘intergenerational staff turnover’ in companies, allow for knowledge transfer from older to younger workers, and a phased, flexible movement into retirement for those close to the end of their working lives. The so-called ‘solidarity contracts thus created would (in principle) allow employers to reduce the working hours of older workers while preserving their social security benefit entitlements and ensure that new younger workers could be employed on permanent employment contracts. However, it seemed that the concept was not functioning as it had been intended. One workshop member criticised the approach on the following basis.

Employer’s representative (Rome workshop 1) *“One of the problems in implementation of these active ageing policies is related to the lack of intergenerational dialogue to underpin them.”*

Our research partner explained: *“There are subsidies to support these contracts but the subsidies are not enough and the cost opportunities are not favourable. Companies that have tried to implement these schemes have found older workers not ready to move to part time contract and younger workers not ready to be hired. In part it is a question of costs and in part a question of intergenerational solidarity.”*

The idea, in summary, had not been successful (at least in the eyes of participants) because of a lack of intergenerational dialogue in society and intergenerational solidarity as a whole.

Poland: Researcher’s comment: *“If we understand ‘a generation’ to imply a group of people of similar age, with a common system of values, cultures and worldviews, shaped by the socio-political context in which they grew up, it is sometimes possible to identify five generations in*

a particular company. Such a multiplicity of generations in a workplace may give rise to enormous challenges, though each case is different. There can be issues of communication and of fairness, as newer employees may fail to appreciate why a certain near-retirement employee is treated in a certain way. (The employer may be keen to reestablish the employment relationship with the older worker on a different basis once he has retired, but this may send confusing messages to the younger worker.) In some cases, a younger worker who will replace the pensioner, may not have been trained. In the following examples, the need for intergenerational understanding is obvious.”

Trade union rep (Falenty workshop): *“The question may arise, ‘How will we achieve continuity as we try to transfer the care of this experienced employee, his reliability and the skill of his craft as we ‘on-board’ a new younger worker into the job?’”*

Manger (PRACODAWCY workshop): *“We now have a case that one of the employees reaches retirement age at the end of the year and we agreed that we have to recruit a successor so that they work together. I think that is something that employers must think of. Of course, there are then increases in employment costs caused by doubling up positions, but it is necessary for the continuity of the process and knowledge in the organization.*

UK: There were few if any examples of different generations of workers being in conflict in terms of relationships, though there were some instances where older workers felt that there was a lack of equity because younger workers were able to benefit from different levels of formal education and qualifications. (See next question).

28.2 Intergenerational divide in career paths and formal qualifications

Table 36: How important is the intergenerational divide in career paths and formal qualifications open to older and younger workers? (Assessments by researchers based on participants’ contributions in their workshops)

	Spain	Italy	Poland	UK
Not important,				
A bit important,	X			
Very important		X	X	X

Comments and quotations:

Spain: The following comment reveals, on one hand, a consciousness of generational differences in educational background and training, and on the other, seemingly, an element of regret that practical experience is somehow devalued by the higher educational standards now common in the HR profession. The implications in terms of career opportunities are implicit, in this instance.

Human Resources Manager (private sector): *“People coming behind us have by far more capacity to learn and much more qualifications than us. Experience is no longer as valid as it used to be. I must recognize that I have a lot of experience, but I don’t even know English. And now the human resources specialists coming with a Master degree arrive with novel ideas, and you really don’t know what it is exactly that they are talking about.”*

Italy: Trade union rep, Rome workshop 3): *“Young people are generally hired with non-standard employment contracts, thus they feel their condition more precarious than older workers”*

UK: The intergenerational qualifications divide was a major concern of our trade union representatives from the NHS Ambulance Service. They were aggrieved that a two tier workforce was emerging in which younger paramedics who held university degrees had far more career development and change opportunities than the older paramedics, who were experienced in the job but denied opportunities to move to managerial positions. Reps felt this was particularly unfair as the same longer-serving (but less well-qualified) staff were more likely to be suffering from various physical or mental conditions arising from the arduous nature of their work. Union reps in the non-profit sector also commented on the intergenerational qualifications divide. They asserted that progression up the salary scale in their organisation had made them more vulnerable should management seek to cut costs by reducing head counts. One practical example was given of older workers not having their fixed term contracts renewed and effectively being replaced by younger (less well paid) employees.

Union Rep (non-profit organisation): *“But the fear is because we’re reasonably well-paid, thankfully, in our jobs, (we may be more vulnerable). But then, there’s lack of motivation... and they’ve been there for years, but there’s a very poor chance of getting another job when you’re 60, 62, and 50s. So, ‘you are stuck...’ And if you were to get another job, comparably, the wage is going to be much lower.”*

28.3 Generational divide and youth unemployment

Table 37: Connection made by participants between generational divide and youth unemployment (Assessments by researchers based on contributions in workshops)

	Spain	Italy	Poland	UK
No, not at all				
Yes, there is a link but it was not strongly expressed	X		X	X
Yes, strongly linked		X		

Comments and quotations:

Spain: Paradoxically, the "generational divide" has appeared in relation to the unemployment of older people. When the latter get a job, these people do everything possible to work intensively (as many hours as possible) in order to be able to contribute enough to receive a retirement pension. In this context, other younger workers may complain that these older people are favoured.

Union rep (Private Sector workshop): *"Those women have been working all their lives but they [did not have a formal contract and thus] have not contributed to the public pension system. Now they have found a company that gives them a proper contract and they want all the hours they can get because they want the highest possible category because they want to receive a pension.... There are younger workers who say, 'I am not going to work fewer hours just because I am younger, they should have found this job sooner'"*.

Italy: Employer's representative (Rome workshop 3) *"Pension reforms and the extension of working life have reduced the possibilities to hire young workers"* (Note: This statement reflects the perception of the speaker though it is at odds with much received wisdom in the policy discourse.)

Poland: The specific issue of youth unemployment did not figure in the discussions in our Polish workshops. This was unsurprising since in Poland youth and all age unemployment are both low (12.3% youth unemployment, compared with 34.1% in Spain, 31.9% Italy and 11.5% UK). All age unemployment in Poland stands at 5.8%. Concerns around young people and work, centred on other issues, including the extent to which the younger generation are committed to the work ethic.

Employer (Olzstyn workshop): *"The next generation Y which lives laxly, does not identify, does not attach, which is a challenge for us, employers."*

Trade union rep (Falenty workshop): *"There are other problems, but rather in terms of younger employees who don't want to join unions. But nevertheless, we are trying to reach them very slowly..."*

Trade union (or manger) (Olzstyn workshop): *"The young people would like to have a job, most willingly in a state-owned company in the office. They would like to work from 8 to 3 and then don't care after 3:00 PM. They think, 'Let the boss worry.'"*

UK: The issue of youth unemployment was very little mentioned in our workshops and interviews. There were some comments but there seemed to be very little conviction that older workers continuing in the workforce had any impact on the employment prospects of younger workers. Whilst there were some comments (notably in the case of an overseas aid NGO in the not for profit sector and by a representative of a freelance interpreters' union

group in the same workshop) that younger workers were displacing older workers) this was not a commonly held view.

Union Rep (NGO): *I think that somehow you are going to notice that older people have started to disappear from the workplace. We have had so many restructures and there's quite a lot of movement going around... Mostly localised programme staff in the regions. But I don't think we are doing anything specifically for older workers or to support older workers, other than perhaps an arrangement in terms of redundancy packages... And there's also this thing where we're supposed to be giving people opportunities, whereas in reality... you know that people make their assumption when you work at a certain age that's not even that old you know, (like when you get to say year early 40s) (they assume) that you don't want progress in the workplace. They think you don't want to travel... And the reality is that the people with the old contracts are on better conditions... [So the older worker will not be offered a new contract.]*

29. Issues linked to exclusion of older workers

Table 38: Which issues did partners associate with exclusion of older workers? (Assessments by researchers based on contributions in workshops)

	Spain	Italy	Poland	UK
Casual work				X
Promotion opportunities	X			X
Pay levels or increases				
Bonuses		X		
Training opportunities				X
Organisational culture including how older workers are seen by co-workers	X		X	

The above table summarises responses to the question, “Which if any of the following issues were mentioned by your workshop participants as a means or symptom of exclusion of older workers?”

Comments and quotations:

Spain: Our Spanish workshops revealed some striking examples of intergenerational hostility. How typical these were of intergenerational relations, it would be interesting to know.

Union Rep (Private Sector workshop): *“Some younger people comment on 50+ co-workers: ‘Look at her, she can barely do her job, she is not in good condition to care for anyone but herself’. Such comments are hurtful to ourselves as a group, but it's true that they are made. Younger workers see you and they see your age and since you've been in the company for a while, they insinuate that you should leave so that they are able to get your indefinite contract.”*

Union Rep (Private Sector Workshop): *“They put pressure on you, because you are doing the job of an older person who is not leaving but may be absent from work, a person who may not be in the company, then, of course, there is pressure, a lot; other times they tell you, ‘Leave soon, you are senile, why don't you just go?’. They make comments of this type.”*

Italy: Employer's Rep (Rome Workshop 3): *“Older workers (from 40 to 60 years old) are even weaker than young people that enter the labour market for the first time, as for the latter there are tax incentives for open-ended employment contracts, apprenticeship schemes, etc”*

Poland: Researcher's comment: *“Organizational perceptions are inextricably connected with communication and dialogue that raises awareness. Good practices need to be permanently inscribed in companies' policies. Aware managers at all management levels can conduct an effective and open dialogue. Examples were mentioned in one of our workshops of programmes engaging both older and younger employees which allow parents and grandparents to show off their children's talents.”*

Workshop participants made thoughtful contributions on the question of overcoming the exclusion of older workers, though evidence that these challenges were being addressed was less evident:

Trade union rep (Lodz workshop) *“It would probably be necessary to begin with raising awareness and establishing conditions so that the work can be further continued. They know the company, they know the people. Perhaps, they no longer need to perform heavy duties. But, their experience can be still used.”*

And the following point was made concerning the necessity for dialogue if marginalized older workers are to be embraced within the workforce.

Trade union rep (Lodz workshop): *“This is also the task of employers and managers to use such employees, to provide them with some opportunities and to talk to them. Not much can be achieved without a dialogue.”*

UK: Reps gave examples of older workers being recruited into casual or flexible working types of jobs, being overlooked with training opportunities and promotion or extension of a contract.

30. Participants' views on stereotypes of older workers

It is widely argued that older workers suffer from false stereotypes which under-estimate their potential and depict them as a poor hiring choice for employers. How far were such stereotypes part of the frame of reference of our workshop participants? The next table summarises our researchers' assessments on the matter.

Table 39: Did workshop participants broadly go along with common stereotypes about older workers? (Assessments by researchers based on contributions in workshops)

	Spain	Italy	Poland	UK
Went along with general assumptions			X	
Seemed to challenge them	X	X		X
Not an issue discussed				

Comments and quotations:

Spain: Employer (Private Sector, interview): *"The older worker who gets tired because of his manual work, may have other skills and experience; and experience is possibly more important than physical strength."*

Line manager (Private Sector workshop): *"The company is giving a lot of opportunities and space to all these new and younger people who are arriving now, who enter with a hunger to take on the world, who contribute with many ideas, who take very fast decisions, who all seem to do very well,... but there are still older people in the company and we can also give our vision, our experience,... and I do not know."*

Italy: In fact in the Italian workshops there was little direct discussion of stereotypes of older workers. However, our research partner inferred from the wider discussions and side comments made, that representatives of management and unions were aware of and ready to challenge the negative / restrictive stereotypes about older workers. He reports, *"They had tried to challenge the stereotypes and were eager to deconstruct them and find solutions to avoid negative consequences for older workers."*

Poland: Contributors to the Polish workshops appeared to accept the inevitability of stereotypes.

Trade union rep (Lodz workshop): *"When we consider ageing, we find it is the young people who want to introduce changes and not the older people."*

Employer representative (Lodz workshop): *“Stereotypes are embedded in society and perpetuated by the media and decision-makers. Employers can do little about them.”*

UK: There were two aspects to the ways participants seemed to think about being an older worker. On one hand both employers and union reps tended to emphasise their *enduring capability* because of greater experience and knowledge. On the other hand, both groups also acknowledged that age brought a tendency to slow down. Union reps argued that allowances of some kind should be made for the older worker. Management participants in the workshops did not seem unsympathetic to this idea, though the occupational health physician whom we interviewed stressed that it was rare in practice for such allowances to be made as did union reps in the NHS ambulance service and the construction sector workshop.

Reps’ complaints were to the effect that management did not make enough allowances for the older worker’s increasing physical limitations and at the same time, they failed to appreciate that older workers could contribute valuable knowledge and skills to the organisation if called upon to do so. Deeply held views were forcefully advanced to the effect that management *ought* to make better use of older workers’ skills and know-how, particularly in supporting younger workers. A rep from the NHS ambulance service gave the example of older workers being tougher and more resilient than younger workers when it came to dealing with the emotionally disturbing experiences encountered in the job. On one hand, he argued, the traumatic aspects of work as an ambulance were a reason for *not* expecting paramedics to extend their working lives, but on the other hand, older workers had a measure of toughness in dealing with the higher levels of stress and trauma, which younger entrants to the ambulance service faced but without the same resilience to cope and less experience in the job.

Union Rep (Ambulance service): *“They reckoned...when we first started, the average life span for a paramedic would be about 15 years. Now, it’s down to seven. They reckon in another two years it’s going to be down to five. And that’s going to massively impact...you know. They’re 20 now. They’re going to have to retire, won’t they, if they ever get there? Whether you are 20, 30, 40, 50, 60, we are exposed to stuff that the average person will never see in a lifetime.”*

31. Intergenerational solidarity

“Intergenerational solidarity” is a malleable concept, meaning different things to different people. At one level, it refers to public policies which support both improved benefits for older people and initiatives to help younger people gain skills and enter employment. At other levels it can refer to campaigns to eliminate loneliness in older people’s lives and

Addressing the issue of housing affordability, especially for younger people living in cities. Intergenerational solidarity at work may be roughly defined in terms of a recognition between older and younger workers of shared interests in exchanging knowledge, skills and aptitudes; acknowledging the challenges facing different generations and wherever possible, extending a helping hand from one generation to assist another. Policies can be put in place to reflect or consolidate intergenerational solidarity, sometimes implying a degree of sacrifice by one generation in response to the needs of another. How far did our workshop participants recognise the existence of such solidarity? The table 40 summarises the evidence of researchers' observations, with comments and quotations below.

Table 40: Presence and forms of intergenerational solidarity? (Assessments by researchers based on contributions in workshops)

Question: Did workshop participants give examples of measures taken, or suggest ideas for future action, that could be seen as examples of "intergenerational solidarity"?	Spain	Italy	Poland	UK
Yes they gave examples of measures taken	X	X	X	
Yes, they put forward ideas for future actions			X	X
Not an issue we discussed				

Comments and quotations:

Examples of intergenerational solidarity include supportive actions of different kinds by one generation towards another. In some instances such actions may be performed altruistically, though in many cases a mutual advantage solution may be offered. Older workers supporting younger workers' induction and training into a trade might be considered one example of intergenerational solidarity. Others include situations where on an individual level, members of a younger generation behave in an empathetic way towards older people, workers or otherwise.

Spain: There were times when the social partners acknowledged the value of intergenerational solidarity but they did not really cover down-to-earth measures to achieve it.

Line Manager (Public Sector workshop): *“One of the things that can contribute or we can bring to those who now have a certain age is our experience. I believe that one of my functions right now is precisely to do with those who come behind, who are now the backbone of the company. I am no longer in that first line, then I must help them to learn, to rise, to improve ... ” (line manager, public, workshop).*

Human Resources Manager (Private sector workshop): *“I have met many workers when they are about to retire who come and say, ‘I have taught everyone who has passed by here’. I’m not talking about team leaders but just ordinary workers.”*

Italy: Trade union representative (Modena workshop) *“An example of cross-generational solidarity flows from the national sectoral collective agreement (NCLA) of the banking sector. A provision of the NCLA renewed in 2015 invites the managerial staff to contribute 4% of their fixed salary to the F.O.C. (the National Employment Fund, set up in 2012 in order to create fruitful and stable employment by supporting the permanent employment of young people), to demonstrate solidarity between generations.”*

Poland: Research partner: *“Respondents in our workshops commented on the different ways the generations approached work, noting in particular their differing forms of motivation, expectations and behaviors. They did not report on any conflict between the generations. Trade union representatives argued that younger people are not especially eager to join trade unions. They observed that changes in work methods and organisation could impact differently on the different generations. They noted that working in intergenerational teams brought a different quality to the way work was experienced. Mentoring was noticed, both in the traditional form, but also in reverse mentoring, in which the mentor's role is played by a younger employee and even a trainee. There were also opinions that older workers are great as mentors.”*

Union representative (Falenty workshop): *“We had men aged 60 using computers but lacking the skills and familiarity to do the job. Young girls who were skilled and experienced in working on PCs were able to support these older employees. However, in the production departments, we have had older people with the skills and experience to perform the manual tasks required and they were able to demonstrate how the job should be done. So, in this case, older employees took care of the young people. Of course, by doing the work and additionally sharing their experience and knowledge, these employees, these employees became entitled to extra pay. Hence, the older employee feels valued and earned a bonus. In addition to controlling the safety of the product and service, he also taught the younger worker how the job should be done.”*

UK: In several of our workshops comment was made that older workers could perform useful roles mentoring others. For example in the NHS workshop a speaker commented:

“... you know, you’re losing a lot of experience....You lose 30 years of experience in the blink of an eye from our organisation [when older workers leave early] and I’m pretty sure it is the same, probably in every ambulance service there is...But to them [the management] that doesn’t matter... The older person is not being valued for that 30 years’ experience where they could then go and teach. You know, [the older workers] are just seen as dinosaurs.”

In our session with K-Com managers, several contributors commented enthusiastically on the potential uses to which they could put telephone engineers who were no longer able to perform installation and repair work which entailed climbing telegraph poles.

K-Com Manger – Customer Services: *“I would snap them up tomorrow. They might not want to be climbing up poles [this is a reference to telephone engineers], but to me, in my area, they would be really skilled people that would have a lot of experience, and I think that’s the point. It’s that this ‘stepping down’, or whatever you want to call it, doesn’t necessarily have to be your part-time job in a garden. I have a lot of people who work reduced hours. We’re quite flexible; we accommodate people, parents, people that are prepping for retirement, all of that. But we’ve got a really good skillset in our business, and ... we tend to think to ourselves, ‘They can’t climb the pole anymore.’ So [maybe] they will go off somewhere else, [but we can avoid this by] looking internal to our business and asking, ‘What opportunities do we have within our business for people who want to wind down?’”*

32. Responses by management to active ageing challenges

In our workshops we shared examples of a number of “innovative approaches” to promoting active ageing, in order to gauge the reactions of participants. We mention of some of these in this section and indicate summaries of reactions to them in tables 41 and 42, addressing respectively, the challenge of maintaining productivity and providing sustainable work and working environments. Comments from participants are below both tables. (Note, our collected good practices and ideas for the toolkit produced as part of the ASPIRE project will reflect both the ideas thrown up in the workshops and interviews and those generated less directly).

32.1 Productivity

The need to achieve and maintain consistently high levels of productivity is an enduring pre-occupation of operational managers and supported frequently by Human resource management policies which lay stress on performance evaluations, appraisals, bonus systems and other incentivising pay systems to maintain high output. Considerable effort is applied in all manufacturing and many service industries to achievement of quality and quantity of output. It is therefore unsurprising that many managers, asked to comment on the challenges posed by an ageing workforce, lay great stress on the problem of maintaining high levels of productivity should their workforce become significantly older. Table 41 offers a range of

actions which might have been taken to maintain or boost productivity, given the presence of an ageing workforce.

Table 41: Did any of the workshops or interviews supply examples of the following kinds of actions to boost productivity?

	Spain	Italy	Poland	UK
Early retirement to get rid of “low productive” older workers	X	None given	X	X
Use of older workers as a non-permanent highly flexible form of labour	None given	None given	None given	X
Retention of older workers to avoid recruiting and training younger workers	None given	X	None given	None given

Spain: Comments from our Spanish researcher reflect a deep scepticism of efforts to maintain high productivity given an ageing workforce. He observes that in Spain, “*Perception of ‘low productivity’ is very much linked to the idea that higher labour costs are associated with older workers.*”

The following comments suggest strongly that rather than seeing active ageing as a means of enhancing productivity and economic performance, it is seen as an additional burden on management.

Union Rep (Public Sector workshop): *“The issue of aging in our company is never been put on the table, other than to take workers out of the way via early retirement and bring in new people, who also are a much smaller economic burden for the company. This is also an added value.”*

Union rep (Private Sector, interview): *“The employer's reasons are always the same: he wants a reasonably viable company, economically good and everything that does not help to reach a good performance, he thinks to himself, ‘Why do I need this?’ If an employer comes here and he is sincere, he will say that. If we tell him that active ageing is a good policy for his workers to be better, he will say that active ageing is secondary. He will say, ‘If I am able to, I will introduce some active ageing measures, but these measures won’t be a priority’. The priority is with the economic performance.”*

Italy: In marked contrast to the above observations from our Spanish workshops, an HR manager in one of our Italian workshops homed in on the added value of older workers in their ability to provide needed skills.

HR Manager (Rome workshop 2): *“My company is interested in extending working age because older workers have skills that are not available in the labour market and that cannot be developed within the organization in a short time. For this reason, there is an ‘alarm’ in the company, a fear that these people can access to early retirement because their professionalism is hardly replaceable”*

Poland: Poland: Examples were given in our workshops of employers who had sought to increase productivity by eliminating what they perceived to be less productive older workers. Against that, the practice of allowing older workers to retire and then rehiring them to work as self-employed or in a consultancy capacity, is fairly common.

Trade union rep (Falenty workshop): *“I have seen many instances where the employer has been afraid to keep older employees. Instead of pursuing an age management strategy, they have run programmes of voluntary redundancy aimed at older employees. They encourage them with financial incentives to leave the organisation rather than introducing incentives and making adaptations to the work so that working longer is possible right up until retirement age. I have been with my present company for some years and have seen several programmes of this kind.”*

Manager (Warsaw workshop): *“I have employees who have reached the retirement age, who retire and continue working with us. From an economic point of view, we also let them retire and hire those employees again. Also their knowledge, experience and willingness are invaluable and it also impresses me that someone does the same job for 40 years and still wants to do it, because he likes it a lot.”*

UK: Union reps and employers shared examples of employers who had concerns about the declining productivity of older workers, frequently with respect to their speed of working. Some employers express concerns that the removal of a legal right to impose “mandatory retirement”, will result in them being forced to apply “capability procedures” to some employees, whereas formerly they could wait for the employee to retire at the normal retirement age. On the other hand, union reps were critical of the way workers could be heartlessly “got rid of,” because they were no longer of use to the company.

Union Rep 1 (Construction sector): *“... with someone retiring, they just disappear, and that’s it, you say, ‘I haven’t seen him for a while.’”*

Rep 2: *“Or you go the funeral.”*

Rep 3: *“Or you go to the funeral.”*

Rep 1: *“The last company I was with, XXX, I knew a machine driver who spent 45 years and he loved the company and he was going on about his retirement....He worked for them on Friday, he didn’t work for them Monday. No acknowledgement of the service, no hand shake, that’s it, you’ve just don’t work for them no more. They told him, ‘You’re pension age, you can go now.’ They may as well have said, ‘You are a resource, you are like that digger over there, you are a resource and we don’t need you.’ Once the digger’s knackered what happens to it? It goes to the breakage yard. Does anyone talk about that digger, that’s gone? No. That’s all we are, really, if you look at it.”*

Such feelings about employers’ attitudes were by no means universal however. The Financial Services sector contained some employers who were seen to be more tolerant of workers slowing down.

Union Rep (Financial Services): *“No, the managers, generally, are good, most of them are company orientated, and they back the company 100 per cent, but at the same time, they will be understanding if someone has got special circumstances - probably because they have to be by law - and they make sure that they do everything right. There’s no undue pressure put on anybody who’s of a certain age, whether young, middle-aged or towards the elder age group, which I’m getting towards. There’s no pressure that way.*

“There are no redundancies. People who have been there a long time, that’s what they’re waiting for, to leave with a severance payment, but realistically they’re not going to get it. On the other hand, the company worldwide would probably be quite happy to say, ‘Well, if you leave by natural means it’s a money saving object,’ without saying, ‘You need to leave. You’ve hit the retirement age, you’ve got to go.’ I’ve got people who are working past the retirement age. Some work part time, some work full time, but when you ask them how old they are you’re surprised because they don’t look their age and they don’t seem it. That’s broadly what I get.”

Comments and facts: Contingent working, including people who are classified as “self-employed,” has increased quickly in the UK among older people since the economic downturn in 2008-9. However, it is still a very small minority of workers who are affected. The growth in self-employment has been most significant among people over 65, accelerating rapidly from the second quarter of 2009. ONS figures show that the fastest growth rates in self-employment are among those with degree level qualifications. While a tightening labour market may result in more employers being readier to offer part time working, the rise of the “gig economy” continues to support extreme forms of self-employment, including zero hours contracts. Our workshops offered only a few insights into how these developments are being received in the workplace.

One union rep in an NHS Trust was critical of her employer for failing to introduce flexible working to encourage recruitment of working women and others with caring responsibilities. Another commented that there were too few part time jobs available to fill demand, and very few opportunities to job share.

Rep (NHS /Voluntary Sector Workshop): *“I find that despite all the rhetoric about flexible hours and part-time jobs, if you look ... at the number of part-time jobs, it’s a tiny fraction of the number of jobs there are overall. So I think there’s been very little movement on the whole concept of job sharing and part-time work and so on.”*

32.2 Sustainability

The need for all workers to be employed in work which is “sustainable” is now recognised widely, in large measure as result of the EU’s Europe 2020 strategy, focusing on the provision of “smart, sustainable and inclusive growth. Sustainable jobs require working conditions that enable people to remain in the workforce over a life-course. Making work sustainable is said, by the European Foundation for the Improvement of Living and Working Conditions, to require attention to the working environment and characteristics of the job as well as the characteristics of the individual.⁷ Sustainability and “the business case” for employing older workers, are two sides of the same coin. If employers are alert to “the business case for maintaining the working capacity and usefulness of their workers as they age, they should in principle be willing to consider how to address the issue of sustainability. Table 2 summarises research partners’ assessments of employers’ awareness of the business case for older workers.

Table 42: Were employers alert to the business case for older workers? (Assessments by researchers based on contributions in workshops)

	Spain	Italy	Poland	UK
Yes		X		X
No	X		X	

Comments and quotations:

Spain: Our research partner comments, “There is awareness - still little - about the growing demographic ageing but not about the positive elements, entrepreneurially speaking, that may bring the sustainable ageing of the workforce. Nor, generally speaking, do employers really know what to do about it.”

⁷ Eurofound (2016), [Sustainable work throughout the life course: National policies and strategies](#), Luxembourg

UK: Responses from participants were mixed. Union reps were often critical of employers for failing to see the business case for employing older workers and generally for failing to consider what needed to be done to make jobs more sustainable for the older worker. On the other hand, some employers seemed to see the business case for employing older workers and therefore for making changes in their working conditions to ensure they remained in the workforce.

Employer, Small IT Business, London: *“Of the last six people we have hired, three have been recent university graduates and three have been older workers whom we have engaged on a flexible basis. All three are 60 plus and one is 65 plus. They were hired mainly because of the experience they can bring to the technology team but we have hired them on a very flexible basis. They can work from wherever they want to work and for the days and hours they want to work. This arrangement has been what has attracted them to join us rather than continuing to work for big corporates.”*

In contrast to the above positive example of an employer regarding older workers as a “business opportunity,” union reps commented on employers’ failure to deter early departures. A representative of the Employers Network on Equality and Inclusion, recognised the rarity of employers in taking pro-active, pro-age measures:

Employer rep (ENEI interview): *“I am not aware of companies being actively age positive in the sense of putting policies into place to specifically support an older workforce.”*

(The same speaker subsequently qualified this by mentioning the Barclays Bolder Apprenticeship scheme as a specific age positive example of training older employees.)

32.3 Developing business cases for active ageing and sustainable work

Many examples have been published elsewhere of initiatives and case studies of employers working towards considered business case approaches to sustainable work and active ageing.⁸ Our research team did not seek to replicate these enquiries in terms of the substance of policies and practices, but instead focused on evidence of commitment to processes supporting “business case” approaches. Actions identified were the establishment of joint working groups or management task groups to lead change programmes and designing specific responses for targeted groups within the workforce. Research partners commented on whether or not these had been evidenced in workshops. (Responses are summarised in table 43.)

⁸ Naegele, Gerhard and Walker, Alan “A Guide to Good Practice in Age Management”, Dublin 2012

Table 43: Participants quotes of actions taken to develop business case for active ageing (Positive responses = X)

Type of action	Spain	Italy	Poland	UK
Joint working groups on ageing and working		X		X
Management task group or team to lead development of age and work changes			X	X
Specific responses aimed at targeted group within workforce	X			

Comments, quotations and examples cited:

Spain:

Human resources manager (public sector workshop): *“I have here a resolution that this government team has made. ... We made an extraordinary reduction in working hours for the administration and service staff. Until now the right to enjoy this reduction was once you were 62 years old, you could reduce your work day by two hours. We have extended it to people over 60 years old.”*

Italy: Joint working groups on ageing and working: HR Manager (Rome workshop 2) *“Our Company is carrying out an analysis within the different departments. These were carried out in order to highlight how the working population’s aging affects shift distribution, absenteeism and job protection”*

Social partners generally agree that “sustainability” is the keyword to approach the issue. This means keeping older workers productive and allowing them to respond to the increasing work-life balance demands.

An employer representative put the emphasis differently:

Employer representative (Workshop 2): *“Sustainable ageing means ensuring that the ageing of working population does not lead to a decrease in efficiency or to an increase in labour costs related to absenteeism due to health problems, replacement costs and other setbacks that are not compensated by productivity growth.”*

In general, the approach of employers to active ageing tends to strike a balance between sustainability and productivity of an ageing workforce. Thus:

HR Manager (Workshop 1): *“The policy rationale should aim to combine the needs of older workers, in terms of work-life-balance, health and safety and motivation, with the need of the companies to keep workers productive.”*

For labour, active ageing should allow older workers to respond to their increasing work-life balance needs and health care demands that longevity and extending working age involves, without reducing their labour market participation and the participation in the society as a whole.

Trade union representative (workshop 1): *“The concept of ‘active ageing’ does not include the specification ‘at work’. Active ageing is not only about work. Therefore, active ageing policies should not be focussed on work only. Active ageing is also about keeping active older workers that have abandoned the labour market. Active ageing beyond work is related to the importance and the role of older people in the society and it has important consequences, particularly regarding social services”.*

An employer’s representative supported this version

Employer (Workshop 2): *“The point is to implement active ageing policies at 360 degrees as active ageing does not regard only the traditional employment contract, but it refers also to other aspects, for example, volunteering. It is important to keep older people active in the society to guarantee the overall sustainability of the system.”*

Poland: Trade union rep (Volkswagen, Poznan): We organise joint workshops for our employees and management group. We find these are a good opportunity to work on common solutions.

UK: The following examples are given:

- *Joint working groups on ageing and working:*

The NHS Working Longer Review Group is a rare example of a joint employer and trade union group working on age and retirement issues. It has worked nationally in the National Health Service, seeking evidence, commissioning research and producing tools and examples for NHS employers to implement locally in individual NHS trusts.

- *Management task group or team to lead development of age and work changes*

Business in the Community Age Project has established a project with this intention. It has been a high profile campaign with tools and resources available on a special Business in the Community Age Campaign website: <https://age.bitc.org.uk/> Companies are encouraged to sign up for the BITC Diversity Benchmark and become a partner in the BITC Age at Work

campaign. There has been no trade union involvement in the campaign however and the social dialogue potential of working with the unions appears to have been unrecognised.

- *Specific responses aimed at targeted group within workforce:* A rep in the finance sector gave the example that his section within the company he worked for, was a popular place to put people who were looking for a career change. “It can be anyone but it tends to be people of older years.”

33. Financing and other support for active ageing

Given that changes at workplace level have not occurred sufficiently widely to alleviate concerns, what forms of support might make a difference? Our research team was asked for examples demonstrating new or different approaches to financing or other measures to support active ageing. Table 44 shows responses.

Table 44: Were examples given of specific measures to finance changes to support active ageing? (Observations by researchers based on contributions in workshops)

Type of action	Spain	Italy	Poland	UK
Funds which are under the joint control of employees and employer in some way (bilateral funds)		Bilateral funds		No examples quoted or given.
Collaboration with Government bodies		Bilateral funds		Government Department for Work and Pensions and Centre for Ageing Better – see expanded note below.
Pension funds used to support work adjustments		Pension funds supported by bilateral funds but these are not used to support work adjustments		No Examples given

Comments and quotations:

Spain: No examples quoted. Social partners expressed their interest in knowing which governmental sources of funding are in place in other countries to support active ageing developments at workplaces.

Italy: Researcher's observation: *"The main legislative measures that Italy has used to promote later retirement has been the rise of the retirement age, the reduction of incentives for early retirement, and the introduction of some specific contracts – such as an on-call contract or casual work – that can be concluded with employees over 50. There are also economic incentives for employers that hire an employee over 50 with a fixed-term contract, such as the 50% reduction in employer contributions for 12 months. Contractual agreements foresee different measures to promote active ageing, including the following: transforming permanent full-time jobs into part-time and facilitating the reduction of working hours, or gradual retirement, to generate new job opportunities for young people."*

Poland: Respondents said that finance to support active ageing was not alone a problem. On the other hand, they said that for change to be effective it was necessary to spread the impact through social dialogue.

Employer (Olsztyn workshop): *"We need social dialogue institutions not only at central and provincial levels, but also at the poviast (county) level and at the level of the commune. This is a social movement for building a culture of civic communication with each other. This is something that gives a chance to create a new reality culture."*

Another employer saw the challenge more in terms of changing consciousness.

Employer (Olsztyn workshop): *"Lack of finance can be a hindrance, but this is just the beginning.... Our first job is to change consciousness. We may need a change in regulations and maybe some legislative changes at the next stage. There are some programs we can use to provide finance."*

One employer argued for grants and incentives to encourage the adoption of active ageing measures. Another identified a need for system solutions and support:

Employer (Falenty workshop): *"There would be a need for national programs. They could include incentives for employers, let's say, by law and perhaps some higher-order regulation so that the employer would be encouraged."*

UK: There is no record of financial support for measures to support active ageing in the workplace being given by the UK Government. Similarly, there has been no support for partnership (i.e. employer/ trade union) approaches to this issue including in the area of age management. However, there have been several initiatives which have taken the form of non-financial support for extended working lives. These are explained below.

- Acas; The quasi-independent, advisory and conciliation service ACAS advises employers and employees in employment matters. It issues guidance on dealing with age discrimination and complying with the legislation. The publication, “Age and the Workplace: A guide for Employers and Employees,” (ACAS, March 2014), is a comprehensive guide but contains no reference to consultation with trades unions or employee collective bodies.
- The Government Department for Work and Pensions; The DWP has actively encouraged employers to work towards active ageing. Soon after the creation of Department for Work and Pensions in 2001, a new departmental team was established to commission research on Extending Working Lives and initiate campaigns. In 2014, the term, Fuller Working Lives became the DWP’s brand for policy initiatives on the ageing workforce, including influencing employer policies and practices regarding the employment of older workers.
- Business Champion for Older Workers: As part of the Fuller Working Lives campaign in 2014, Economist and pensions expert Ros Altmann was appointed as a “Business Champion for Older Workers”. Subsequently, after the election of the Conservative Government in 2015 Altmann was promoted to the House of Lords and became the new Minister for Pensions. In 2016 Andy Biggs, leader of the Business in the Community (BITC) Age at Work team and CEO of Aviva Life, was appointed as Business Champion for Older Workers’ to replace Altmann. Neither Altmann nor Biggs have specifically sought to reach out to trade unions or employee “voice” organisations or advocated a social dialogue approach.
- Business Strategy Group: A business to business, “Business Strategy Group”, supported by the Government in 2016 on the initiative of Altmann together with Merckers and insurance company AVIVA, led to publication of, “Fuller Working Lives: A Partnership Approach.” This contains high level advice to employers but makes no reference at all to engagement with workers’ representatives or trade unions and fails to mention the idea of a “collective employee voice” in working towards active ageing.
- Centre for Ageing Better and Business in the Community: The Business in the Community Age Campaign supported by the Centre for Ageing Better, a foundation supported by the state lottery, has supported initiatives relevant to the ageing workforce as an employer led campaign. Hence, attempts to project a social partnership collaboration on the issues of workforce ageing have been conspicuously absent from Government initiatives in the UK. Outside of Government, a separate CIPD / TUC publication Managing Age, (2011 – TUC/ CIPD/ CROW) makes reference to a

strategy of engagement with workers through their collective representation bodies (trade unions, staff forums or similar) in progressing towards active ageing in the UK.

34. Collective voice to express needs of older workers

The research team gathered examples of a “collective voice” used in social dialogue on issues relating to active ageing or in support of the position of older workers.

Each of our partner countries reported examples in which a workers’ collective voice had been used to express the needs of older workers. Table 45 summarises the means whereby the collective voice had been given effect.

Table 45: Form of collective voice used in dialogue over active ageing /related issues (Reports by Research Partners)

Form of Collective voice used on behalf of older workers	Spain	Italy	Poland	UK
Collective bargaining or framework agreement	X		X	X
Employee network of some kind				X
Multi-generational working groups		X		No specific examples
Age dealt with under health and safety procedures		Not directly		X
Age issues dealt with using individual rights		X		X
Statutory and contractual measures which carry the force of law, including multi-employer, national and regional agreements		X		X In the nationalised industries and NHS

Comments and quotations:

Spain: There were some examples of age issues being raised as part of a collective bargaining process or in works councils...

Human Resources Manager (Private Sector Workshop): *“This theme [the ageing of the workforce] is very present in the consciousness of the people that manage the volume of our workforce. We have the possibility of negotiating collective agreements periodically with the workers. Both the works council and we (the employer) always raise the issue in the collective bargaining.”*

... and some instances where as part of a health and safety procedure allowing requests for flexible working, age issues had been somewhat tangentially addressed.

Comment from Spanish research partner: *“Health is considered a part of the “quality of life at work” framework (one that it is not necessarily linked to the ageing process) but in Spain has not been identified as part of the “active ageing” framework as yet. However, during the workshops and interviews it was often argued that attention to health and legislation about health care at work might be a good start to introduce the ‘active ageing’ framework in the workplace.”*

The following union rep and works council member offered an insight into the positive benefits of social dialogue.

Union Rep, (Public Sector, interview): *“When the company performing the medical exams on our workers comes to visit us every year, ...we usually talk to our older colleagues. We are interested in their abilities and the company, in my opinion, is always willing to adapt things because for them adaptation means a great saving of money.”*

A Human Resources Manager refers to a provision to reduce working time for older staff. (He expresses dissatisfaction that the provision has been extended more broadly.)

Human Resources Manager (Public Sector workshop): *“I have a provision that allows an extraordinary reduction of working hours for some staff. It used to be that once you reached 62 years old, you could reduce the working day by two hours. But we extended this principle to people over 60 years old. Unfortunately we have then had a huge amount of problems in running the services once this change was implemented.”*

Italy: Researcher's comment: *"Although the promotion of active ageing is not among the priorities of social partners in Italy, the issue is starting to be considered following some pressures from both workers' organisations and organisations representing employers. Social partners recognise that active ageing is an issue of considerable concern, but it needs time to reach the top of their agendas. This helps to explain why active ageing measures in collective agreements are rare."*

Several statutory and contractual measures are provided to promote active ageing. The main legislative measures that Italy has used to promote late retirement has been raising the retirement age, the reduction of incentives for early retirement, and the introduction of some specific contracts – such as an on-call contract or casual work – that can be concluded with employees over 50. There are also economic incentives for employers that hire an employee over 50 with a fixed-term contract, such as a 50 per cent reduction in employer contributions for 12 months. Contractual agreements outline different measures to promote active ageing including transforming permanent full-time jobs into part-time jobs and facilitating the reduction of working hours or gradual retirement to generate new job opportunities for young people. Age issues are sometimes dealt with using individual rights – unions support their members in individual conflicts over such matters.

Our research partner comments: *"Italy has relatively strong labour market institutions and a meso-corporatist form of labour regulation which takes place at different levels, including statutory legislation, multi-employer agreements at national, industry and regional levels, firm-level bargaining and Human Resource Management. The intersection between these sources is crucial to understanding the country's strategies towards an ageing workforce. Those sources are complementary and coordinated in principle; most of the time, statutory legislation is expected to be implemented or complemented by collective bargaining provisions. Similarly, collective bargaining standards and other bilateral policies negotiated at sectoral level are expected to be applied via firm-level bargaining or HRM. Coordination between different sources of regulation is based on vertical and horizontal subsidiarity. "*

UK: Reps had taken up specific issues – not necessarily under the guise of age management or specifically related to older workers as a separate group, but (for example) in areas of health and safety or to defend individuals under disciplinary proceedings. The main area where unions have been engaged in *collective* discussions specifically over active ageing issues seems to be in the matter of pensions and retirement. Here, the issues tend to be complex, require high level involvement of national negotiators and are generally only likely to lead in long term solutions. Reps in the NHS whom we met were well aware that a Working Longer Review Group had been established as part of negotiations around pension ages. They were also closely identified with the union's position, challenging the raising of pension

ages for ambulance paramedics. This is one of the rare examples where a collective agreement dealing with age and healthily working longer had an impact on a whole sector in the British system. On the other hand, it is fair to mention that in the UK workshops, there was no mention of these national level discussions having resulted in local level consultation around active ageing issues, so it appears that follow up training of union reps is required in some form.

Comment: The need to foster ageing actively has been acknowledged for more than twenty years in the EU, yet concerns persist at the slow rate of progress in the form of comprehensive workplace “age management” policies and other such measures. Given the slow rate of progress, it would seem important that countries and the European Union should consider carefully, putting in place “nudge policies,” which might inspire social partnership discussions at workplaces and “grease the wheels” of progress towards better and more widespread adoption of good practices.

35. Impact of Social Dialogue on Active Ageing Policies

We asked for examples of how the “collective voice” mechanism had impacted on active ageing policies in organisations and how useful union contributions had been to furthering the goal of supporting active and sustainable working for older workers.

Comments and quotations:

Spain: Some of the participating trade union representatives told of their efforts to make employers understand the importance of taking measures to support ageing workers and to raise the awareness of employers.

Union Rep (public company): *“I have been in the provincial negotiation of the agreement [...] and I really tell you that the social part [i.e. unions] tries to convey to the entrepreneurs that they should accept some measure of adaptation about ageing and the employers do not even consider it because their argument is that dismissal is not that expensive”*

Our research partner points out: *“The lack of a ‘collective voice’ regarding active ageing is borne out in the content of the last national agreement signed by employers and unions around employment and collective bargaining, dated July 2018. This document refers to retirement (in the sense of asking the Government to reinstate the possibility of forced retirement when the worker reaches the ordinary retirement age - provided that the worker has the right to full pension). Why this request? To facilitate a generational change in short, the hiring of younger workers. The latter seems much more relevant than betting on active ageing, although employers have said that both objectives -forced retirement and active aging, are compatible.”*

Comment: The above provision in a collective agreement, would seem tantamount to the parties harking back to the “good old days” when ageist policies and practices reigned supreme. Quite apart from the fact that the adoption of such a policy would put the Spanish government on a limb (in terms of non-adherence to EU social and economic policies around the ageing workforce and promotion of extending working lives) it would potentially place Spanish employers at risk of legal actions for age discrimination in the domestic courts or the European Court of Justice. It will be interesting to see whether the call (to reintroduce forced retirement) is taken up by the Spanish government and if so, what the consequences may be.

Italy: Our research partner reports, *“Partnerships between employers’ associations and trade unions do exist, and bilateral projects are implemented. Part-time regulation in many sectors is the result of joint agreements between social partners representing both sides of the industry. The same goes for health insurance policies defined bilaterally. These issues are not really negotiated within an active ageing policy framework. Their justification may be on other grounds (e.g. welfare state retrenchment, increasing working time flexibility etc.), though indirectly they can be regarded as ‘active ageing measures’.”*

According to Italian interviewees, complementary or voluntary healthcare insurance is one of older workers’ main needs because, generally, ageing involves health problems and older workers use an important amount of their salary for healthcare. Sector health bilateral funds represent an important instrument to protect workers’ buying power also because they can be extended to workers’ families.

Bilateral bodies in many industries have set up pension funds to complement public pension schemes, as well as training funds. In addition, the most important national sectoral collective agreements have introduced specific provisions for workers affected by chronic diseases. Provisions include specific forms of part-time work, hourly and daily leave for medical care, job rotation programmes, more sustainable shifts and so forth. Although these provisions are not age limited, it is more likely that older workers use them. It may be the case that they are not explicitly or consciously linked to active ageing policies, but at the end of the day, the effect may be as positive as measures with a more overt link to an active ageing agenda.

UK: In the UK workshops we found evidence that “the collective voice” had impacted on active ageing issues through alternative means, of which collective bargaining was one. Influence through collective bargaining was noticed in relation to pensions and retirement matters, entitlement to specific benefits, training, service related benefits and so on. The issue of active ageing *as a separate issue* did not often appear on the agenda for most of the union or company representatives, though examples may be quoted where this had happened. (The working longer review group in the NHS is an example.)

Several financial services organisations had embarked on employer led “ageing workforce” initiatives with the unions making little contribution to them (Barclays, Aviva) though the resulting changes did not seem especially contentious. A union rep in our financial services workshop explained that his employer had in fact adopted a progressive carers’ policy, though without engagement with the union and its “roll out” had suffered as a result, in his view.

Rep (Finance sector): *“I would always want to make sure, we know how you’re going to roll out a new policy with the managers. Are you going to give them time to absorb the information and give them some guidance on how you expect it to work? ...Because there is a myriad of company policies and I think you need to signpost anything new. You need to say, ‘Right, this is an important change. We’re doing this for X, Y, Z reasons, and when somebody comes to you with a request under this policy this is what we want you to do.’ I think they missed out on that.*

“When you have someone who comes to you with a problem, and you know that there’s a company policy which could help fix the issue, one of your jobs as a rep is to convince the employee to stick their head over the parapet and go and speak to their manager and say something...I think sometimes people are scared to ask for things, and it all comes back, ultimately, to job security. They don’t want to be seen to be difficult and taking up time for their manager, and I think the organisation doesn’t mind them doing that.”

36 Other mechanisms of collective voice

In the UK in particular, where union membership is low in the private sector, employers commonly adopt non-union based systems of social dialogue. The following examples are of interest in the present context.

Parliamentary group: An “All-Party Parliamentary Intergenerational Futures Group” was established in 2009 with the support of a number of non-profit organisations and sympathetic politicians. It was re-established in 2015 as the “Intergenerational Fairness Forum”. While it is a national forum, it carries no authority but is sometimes influential on policy issues and has commented on matters relating to the multi-generational workforce.

Employee networks: There are a number of examples of employee networks. We spoke to a rep who explained that one such network operates among the staff of Hull University.

Union rep (Hull Workshop): *“We’ve got about 50 per cent of our members who are on the 50 plus age bracket, so it’s something that’s high upon our agenda.”*

Age consultation and policy working groups: There are many different forms which such bodies take. In the main they appear to be loosely formed groups, perhaps depending to some extent on the enthusiasm of a given individual

HR Manager HMRC: *“I’ve got responsibility for the age consultation group in HMRC, which, being honest, has been quite dormant over the last couple of years. We’ve now got a new age champion now in xxx, who is also the chief people officer. She’s really passionate around the whole age agenda. It will be good to work with her and see what she wants to bring in around age.”*

Union rep (Hull): *We’re involved in the policy working group that looks at policies and that covers the aging workforce, so that we’ll be looking at the stuff like reasonable adjustments in the workplace as necessary and we get heavily involved in all the policies and work with managements on them.”*

Older workers’ reps or “champions” exist in some large organisations. In others, joint committees have sometimes been set up to consider issue around ageing.

37. Good practices to support active ageing

Our research team members reported on good practices to support active ageing. The presence of a number of good practices, summarised in table 46.

Table 46: Good practices summarised country by country. (Fuller explanations follow the table.)

Type of good practice	Spain	Italy	Poland	UK
Phased retirement	No examples given		No examples given	No examples given
Support in financial planning			No examples given	common in larger companies
Flexible working	Some initiatives in place	X	X	Widespread
Health and wellbeing promotion		Supported by bilateral bodies	X	Common in the largest companies
Specific measures to support one or other gender			No examples given	Good examples in this area
Measures to support lifelong learning		Supported by bilateral bodies	X	Union Learn, an innovative example
Measures to support later life career development			X	Mid Life career review

Measures to support older people being recruited into new jobs or being transferred in the organisation		X	X	Barclays Bolder Apprenticeships
Working commission or similar “big picture” approaches to promote knowledge transfer, age/gender issues		X		
Mentoring and tutoring of older and younger workers promoting intergenerational knowledge exchange		X		
Intergenerational solidarity pacts		X		

37.1 Phased Retirement

Phased retirement schemes allow individuals to gradually reduce their working hours whilst taking an increasing proportion of their pension. Whether or not they have any impact on the numbers of people ageing actively is another matter as it is possible that phased retirement encourages stepping towards complete exodus, rather than the reverse. We asked our research partners to report on the possibilities of taking partial or phased retirement in their countries and on how the issue has been raised in social dialogue.

Table 47: How common is phased retirement? (Observations by researchers based on contributions in workshops)

Spain	Italy	Poland	UK
Partial active retirement	Working time flexibility and part time working	No examples given	Partial and phased retirement possible but not common. Part time working in many forms

Spain: Currently in Spain partial, flexible and active retirement all offer ways to combine work with receipt of a public pension. A recent analysis of 137 state collective agreements (officially approved between September 2016 and August 2017) concluded that the time

honoured, ordinary approaches to retirement remain the predominant approach. Our research partner comments, "In fact, in 2018, 31 per cent of all agreements signed in Spain, included clauses on partial retirement. On the other hand, the options of early and ordinary retirement continue to be fostered and there is a certain longing to regain the possibility of forced retirement for workers reaching the ordinary retirement age"⁹. Neither partial nor phased retirement seem to be finding their way in Spain at the present time.

Italy: Trade unions responses to an ageing workforce are generally focused on working time flexibility. Part-time, smart-working, tele-work and other forms of work-life-balance are important aspects of trade unions' perspective on active ageing

Poland: The Polish pension system provides little flexibility to allow for gradual or staged retirement. Typically, workers work full-time up to their date of retirement. Some flexibility through work-life balance flexibility is possible for women and managers.

UK: In the UK, partial and phased retirement is possible, subject to certain qualifications. One may work *full time* after retirement providing this is not for an employer who pays a retirement pension. If you work *part time* however you *can* receive a pension from the same employer. Some pension schemes make specific arrangements for phased retirement, though all must confirm to the broad rules stated above.

The Teachers' Pension Scheme for example, allows for phased retirement. Teachers who reduce their working hours prior to retirement may draw part of their pension to make up for the income lost by reducing their hours of work. Such schemes are common throughout the public sector or in the private sector where they are based on defined contributions (money purchase) principles.

Where employers recognise trade unions, consultation over pension arrangements are common and unions frequently pursue bargaining objectives. However, pensions issues are often highly complex and social dialogue over them may be protracted over many years.

37.2 Support in financial planning:

While there may be country level differences, many people approaching retirement have concerns about their financial situations. Poor decisions taken at different stages in life can have a profound impact later. Changes in pensions' architecture in some countries may require people approaching retirement to make investment choices, choose annuities and so on. How far do employers provide or facilitate such advice? How far is the question of support in financial planning an issue for discussion between employers and unions? Very little on the evidence of our workshops

⁹ Gala Durán, C. (2017). La relación entre la jubilación y la negociación colectiva tras las últimas reformas. *Documentación laboral*, IV(112). Retrieved from <http://www.edicionescinca.com/revista.php>

Table 48: How common is support for financial planning? (Observations by researchers based on contributions in workshops)

Spain	Italy	Poland	UK
Little activity	Sectoral bilateral funds	Focus on pensions but little on financial planning	common in larger companies

Spain: There was seemingly, little or no employer activity to support workers in making financial plans related to retirement and pensions. Our research partner points out, “In our field work (workshops and interviews) this topic was not raised; therefore, there were no comments by employers and union reps on the subject. However, in 2018 a report was published on good practices in supporting senior workers in Spain¹⁰. The authors acknowledged that financial planning is a “minority strategy” in Spain and one that it is more present in international companies.

Italy: Sectoral bilateral funds are key channels to fund active ageing measures by contribution to income support, and administering joint funds that support workers operating in industries that do not provide wage guarantee funds. Bilateralism is thus used to safeguard workers’ rights. The funds are co-managed. Payments draw from the accumulated resources of the fund but also draw on public welfare benefits provided by the government. They are financed through shared contributions from workers and companies. In some sectors, there are also specific funds for managerial staff.

Bilateral funds can support welfare schemes matching public provision or funding from non-statutory sources. So, for example, social safety net measures may be supplemented with well-established funds run by bilateral bodies.

Government legislation lays down provisions to govern and regulate the organisation of funds for income support and training on the part of relevant authorities. The *Collegato Lavoro* (Connected Work) regulation has given a decisive role to bilateral bodies, particularly by providing unemployment allowances to maintain continuity of income in cases of prolonged unemployment or in the event of stoppages in those sectors that are not covered by wage guarantee funds (*de facto* increasing the levels of protection.)

Bilateral bodies are used to develop supplementary welfare schemes that guarantee that workers are protected when roles and jobs change. In several sectors, social partners have established bilateral funds for integrative pensions and/or for integrative health assistance.

¹⁰ Puyol, R. (Coord.). (2018). *Los trabajadores seniors en la empresa española. Realidades y retos* [Senior workers in Spanish companies. Realities and challenges]. Madrid: Editorial Instituto de Empresa.

All the workers, employed by a company that applies the national collective agreement that established the bilateral funds, are covered by such pension fund/health assistance.

Poland: The overhaul of a new Polish pension fund system, has been in the process of implementation. Under the new system, second-pillar pension funds will be dissolved, with 75% of their assets moving into newly created third-pillar individual pension insurance accounts and the remainder into the centrally administered Demographic Reserve Fund (DRF). Notwithstanding various delays, Poland’s auto-enrolled employee pension plans are opening in 2019, initially for large companies employing a minimum of 250 workers. (Smaller companies with fewer than 20 workers and state companies will follow suit in January 2021.)

The new system is expected to provide an incentive for young people to stay in their jobs longer and for those who are outside schemes to want to join them. The new schemes offer a wide range of additional benefits in addition to the basic pension.

UK: About a quarter of all employers offer financial advice to their employees. One third of employers only match their employees’ pension contributions by the legal minimum of one per cent of earnings – hence many UK workers are badly prepared for retirement and can only look forward to meagre pensions. A report commissioned by the Centre for Business Research showed that 20 per cent of employees do not believe they will ever be able to afford to retire.

37.3 Flexible working:

Flexible working can potentially include a wide range of working practices. Employees may, for example, request a change in working hours, working time or work location. They could propose new working patterns including job sharing, working from home, part time working, flexible working or any other formula which might make it possible or more convenient for them to balance work and other needs. Flexible working might allow an individual to be an active, caring grandparent or support someone who wishes to step gradually into retirement. How far did flexible working with particular attention to the goal of supporting active ageing, figure in the discussions between employers and union representatives?

Table 49: How common is flexible working? (Observations by researchers based on contributions in workshops)

Spain	Italy	Poland	UK
Some initiatives in place	X	Depends on organisational culture.	Widespread

Spain: The following comment was made by a line manager on how his company tried to show consideration for the health and wellbeing of older workers and afford them a degree of flexibility.

Line Manager (Private Sector workshop): *“From the age of 55, we try our best for these workers. For example, we try to ensure that they don’t do night shifts, as we know that shift working can affect them more than other workers. We try to give them light work, for example, working in the dining room, making beds and such. We try not to engage them in tasks involving carrying heavy weight.”*

Human resources manager (public, workshop): *“I have here a resolution that this government team has made. ... We made an extraordinary reduction in working hours for the administration and service staff. Until now the right to enjoy this reduction was once you were 62 years old, you could reduce your working day by two hours. We have extended this arrangement to people over 60 years old, allowing them to reduce their day length by one hour. Unfortunately this reduction has had a big impact on our ability to run the services. One worker wants the time reduction to be at the beginning of the working day, others at the end and sometimes there is no one who can close the work centre. ... This generates a huge number of operational problems.”*

Poland: Employer: “There is need for flexibility and innovativeness... It is not necessary now for the employee to be in the office 8 or 9 hours every day or for him to work from 7 in the morning until 3 in the afternoon. I give my employees flexibility. If they wish to start at 10:00 am, I say, “Be my guest.” On the other hand, if we need them to work stay longer before leaving the job, they are prepared to do so. If they wish to work from home a couple of days during a month we can accommodate that.”

UK: In the UK from June 2014, all employees were given the “right to request” flexible working. This does not mean that everyone has the *right* to work flexibly, rather that everyone can *request* it and expect their employer to consider such requests “in a reasonable manner.”

The HR professional body, the CIPD is currently leading a UK Government task force to promote wider understanding of inclusive flexible work. The independent advisory and conciliation body ACAS has issued guidance to employers on handling requests for flexible working.

37.4 Health and wellbeing promotion

There are critical issues around the ways we live and work which affect our long term health. Some of the issues have been covered in reports of our workshops. Employers in all European companies have a statutory duty to consult over health and wellbeing issues. Hence, in all the partner countries the machinery exists for good social partnership though it may not always be used as effectively as it should be. The issues of active ageing may not be explicitly recognised in the advice given to either employers or to union reps. Greater attention to active ageing and the value of active commuting, team building through sport, constant attention to diet and exercise issues could all be part of a programme to drive forward

an active ageing agenda. This is the issue par excellence which lends itself to social dialogue and social partnership. How far did it emerge in this way during our workshops and interviews?

Table 50: How common are employer approaches to supporting health and wellbeing promotion? (Observations by researchers based on contributions in workshops)

Type of good practice	Spain	Italy	Poland	UK
Health and wellbeing promotion	Some initiatives	Supported by bilateral bodies	Some initiatives	Common in the largest companies

The following examples were cited by our research partners:

Spain: Our Spanish researcher provided a quote from a line manager in a public sector organisation concerning the need to analyse employee sickness absence. Little discussion appears to have occurred in the workshops around the need for analytical occupational health studies, although it should be pointed out that such approaches are widely recognised as “best practice” among OH professionals.

Italy: Bilateral funds are the result of a relationship between active and passive labour market policies in action. In several sectors, social partners established bilateral funds to provide pensions and health assistance. All workers, employed by a company that applies the National Collective Agreement which established these bilateral funds, are covered by a scheme providing pension fund and health care assistance. The funds are financed through shared contributions from workers and companies. In some sectors, there are also specific integrative funds for managerial staff.

Sectoral bilateral funds are key channels to fund active ageing measures. They provide a decisive contribution in terms of income support, by administering mutual assistance schemes to support workers working in industries which do not provide wage guarantee funds. Hence, the funds exist to safeguard workers’ rights. The funds function bilaterally in two ways. Firstly, they are a co-managed method of delivering forms of Government funded welfare (public assistance). Secondly, they go beyond this and allow for innovative welfare schemes to be devised making provisions beyond what the state provides and acting as a sort of social safety net. The use of these bilateral instruments ensures that such schemes are administered by well-established funds run jointly for the interests of workers but also benefiting employers by an efficient system of administration making good human resources policies possible.

A decree passed into law in January 2009 makes provision for income support to be paid by bilateral bodies in the event of stoppages in those sectors that are not covered by wage

guarantee funds. This has of course had the effect of increasing levels of protection for workers in the affected sectors. Similarly, bilateral and joint bodies have been involved in a pilot approach to provision of lifelong learning. If successful it will support the further development of supplementary welfare schemes to guarantee workers' protection.

Poland: Trade union rep (Falenty workshop): *"My company operates in the aviation production sector. Some time ago there were the so called sheltered jobs, for employees who suffered from ill health. During their recuperation period they could perform less demanding work and then return to their previous positions. However, at some point this was no longer possible, not only in my company, but (from what I hear) in other companies too. Employers focus on their basic activities and everything that is auxiliary (especially in manufacturing) or is less strenuous, is outsourced. So if employees deteriorate in health and are no longer able to work efficiently in their position, these sheltered jobs no longer exist as they are serviced by other companies. This is a very big problem."*

Employer rep: *"We organized a "Healthy spine" workshop for employees who work in the office for 10 or 12 hours a day....There was a physiotherapist who talked theoretically, and then showed the exercises and ordered a ladder like that in schools. Many of our workers are young people, on average around 32-33 years old and they go out for a break and practice. Raising awareness is important."*

UK: Many companies adopt health and well-being promotional activities - most commonly the larger companies where better resources and on site facilities can support campaigns and awareness raising activities of various kinds. There are many examples of good health and wellbeing initiatives and projects to draw on including many in-company programmes.

Key issues in long term health and wellbeing initiatives include personal lifestyle issues. Union networks and training schools can provide opportunities to promote the issue of active ageing and the possibilities of driving forward using social dialogue. Union health and safety reps can play a major part in promoting health and wellbeing.

In the following quote a union rep from Barclays Bank describes a joint approach to mental health training in Barclays:

Union Rep (Financial Services Workshop): *"We've had a half day training through Barclays of mental health training. There's a team leader on each floor doing a two-day course and then all the other team leaders did a half day course, but that wasn't through Unite. That was through Barclays. ...Then they're bringing in something new, so each week you have ten or fifteen minutes where they get you to do something for your wellbeing. The idea is to take your mind off your role.... So, they are doing a lot around wellbeing and mental health at the*

moment. I think they've realised that mental health is an issue. They are picking up on it, and they're trying to say what they can do to improve it going forward."

37.5 Measures to support one or other gender

The opportunities to promote an active ageing agenda through the adoption of specific, gender oriented issue campaigns would seem to be considerable. How far was this the reality as reported in our workshops and interviews?

Table 51: Presence of specific gender oriented support (Observations by researchers based on contributions in workshops)

Spain	Italy	Poland	UK
No examples found			Good examples in this area

Spain:

Our research partner comments: "Although latent age discrimination favours early retirement, throughout our fieldwork we have not found evidence of discrimination based on gender; quite the contrary."

Human resources manager (Social services and health sector – Private Sector Workshop): *"You do not look at age or look at the gender when it comes to selecting personnel. Because we have a need for male workers in a care home, to work with frail dependent people, we hire men but we do so on equal terms with the women we employ. Right now it is true that, for example, 85% of the management team are women and we only have 4.9% of men".*

On the other hand, when it comes to retirement (and specifically early retirement) women are forced, at times, to continue working until the mandatory age of retirement. This is so that they are able to earn more years of contributions to social security and therefore to enjoy a better pension. This arises because of the limited opportunities they have had to participate in the labour market (mostly through having dedicated themselves to the care of the family) or because their working conditions have not been adequate or because they have worked intermittently, temporarily or even with no contract of employment. The following example illustrates this idea in a company where the staff is mostly female:

Human resources manager (Private Sector workshop): *"A woman is 67 years old and she cannot retire because she has not reached the minimum contributory threshold to get her pension. Then the company is aware that that person should not physically be working because it is hard work. However, you fully understand that she wants to continue working for another year, for eight more months to get her pension. Therefore, you try to adapt her job as much as possible. This person's abilities are no longer the same and there are also risks that she may suffer a work accident."*

UK: Unions including the public services union UNISON have produced guides for reps and health and safety reps, e.g. Unison and the Royal College of Nursing have both produced guides and campaign materials. Union reps are already doing this through health and safety reps and equality reps and committees. In all these areas the work of unions tends to be recognised and valued by employers providing reps are well equipped with facts and information. Policies have been adopted by several employers, e.g. the University of Leicester, the Faculty of Occupational Medicine has produced a guide on the Menopause and the Workplace. The TUC has published a guide, Supporting Women through the Menopause. These are just some examples of union activities which have been directed towards the adoption of good policies to protect the health of women workers.

37.6 Measures to support lifelong learning:

Clearly, maintaining one's employability is crucial to active ageing. Employers and union reps can work collaboratively. Unions have sought over decades to promote learning among their members and have collaborated with employers. The following are examples of initiatives in our partner countries;

Table 52: Measures to support lifelong learning (Observations by researchers based on contributions in workshops)

Spain	Italy	Poland	UK
Action framework for older people	Supported through bilateral bodies	Some examples in firms, Third Age Universities as a solutions for seniors	Union Learn, Union Learning Fund, Mid Life Career Reviews

Spain:

Comment from Spanish partner: "In 2014 the government issued an Action Framework for Older People including basic principles and orientations for implementing active ageing policies. This document explored preventing 50+ workers' discrimination in work environments and included the following objective to promote lifelong learning: Employers should, "...prevent exclusion of older workers from training activities in the work place and encourage these workers to participate." Eurostat data from 2011 showed that while 25-64 workers in Spain had participated an average of 167 hours per year in formal and non-formal education and training, by 2014 the mean instructions hours for older workers (55-64) had dropped to 100.

Adequate personnel management requires going through adequate training, as a line manager from a private company acknowledged in one of our workshops:

Personnel Manager (Private sector): *“If it is fundamental. ... the issue of training, training and motivation is essential if we want to promote aging.”*

However, being motivated as a worker to invest in lifelong learning is hard when you are in a context in which the prevailing message has been, and to some extent remains to be, the one explained by this line manager from a private company during one of our workshops:

“We have not encouraged motivation. We have a general collective agreement saying that the general retirement age is 65. However, in our sector [...] retirement was negotiated at 60. Then from the age of fifty you start counting down, I have 10 years left, I have 9 years left, and so on. When you are getting that in your work environment you are not motivated to do training or absolutely nothing at all [regarding lifelong learning].”

Italy: Sectoral bilateral training funds established by social partners at sectoral level can be a valid institution to fund and promote lifelong learning. On the subject of training, the Italian legislator has introduced measures to allow bilateral bodies to carry out vocational training activities. Art 118 of Law 388/2000 establishes special funds for life-long learning (called interprofessional joint funds for life-long training – *fondi paritetici interprofessionali per la formazione continua*), that are to be laid down in inter-confederal agreements among the largest employers’ associations and trade unions at a national level. The money allocated amounts to 30% of contributions paid by each worker to employers who join the fund – and corresponds to the mandatory insurance against unemployment. In cases where the employers join the fund on a voluntary basis, it is the National Institution for Insurance against Accidents at Work that is under obligation to pay these amounts of money. Strengthening the role of bilateral bodies as training providers within the company is a result of the view, shared by the parties, that training is a common good and can help to promote employability and competitiveness.

Poland: Employer: *“If someone decides that they would like to get new skills, or would benefit from assertiveness training or anything else, they can sign up. We try to make sure they benefit from the course. People are not just workers, they are complex beings. Learning is not just about work. People have expectations and they want to develop and acquire new competences which are maybe not that useful in everyday work but they make family or social relations easier”.*

“I strongly believe in the power of Third Age University. These are really active seniors who know how to get busy”.

UK: There is acute awareness among UK employers that the country has a “skills problem”. Fundamentally, the country’s vocational training system is weak. Changing jobs and careers

throughout life requires the constant acquisition of new knowledge and skills. Too few employers invest in training their own workers and too few workers invest in upgrading their skills and qualifications through their working lives by their own initiatives. Observers believe that the UK economy will struggle after Brexit unless we are able to train many more people to fill the high skill jobs that will be available for workers.

A key initiative was taken in 1998 by the Labour government's establishment of the Union Learning Fund (ULF). This has provided a means of public investment into the trade unions which have in turn been a major contributor and catalyst to lifelong and work related learning among union members and the wider work community. [The TUC has a central core organisation called Unionlearn.](#) This disburses ULF funds to the unions and organises campaigns and prepares materials.

A regional structure of UnionLearn parallels the TUC's regional structure with UnionLearn staff co-located in the same offices. Paid officials, "Learning Organisers" have been appointed in many of the unions and in most unions, workplace reps with special responsibilities for promoting learning among their members are elected and trained.

In 2018 an [independent report](#) in waves 17 and 18 of the Union Learning Fund, 18,170 training opportunities had been generated for union learning representatives, 5,260 opportunities for people to improve their English, maths and functional skills, 50,160 opportunities for people to gain ICT skills at a variety of levels, 45,190 opportunities for people to gain vocational qualifications at Level 2 to 4, 64,060 Continuing Professional Development (CPD) opportunities had been generated, 37,360 opportunities for people to progress to Further Education, 5,850 opportunities for people to progress to Higher Education, 2,070 traineeship opportunities, 32,440 apprenticeship opportunities.

*"The most common principal motivation for respondents' participation in union learning was to perform better in their current job or to advance their career, gain promotion or a pay rise (37% of learners). Other common motivations were to support people in their community or workplace (22%) or to gain skills that would be useful in their everyday life (30%)."*¹¹

37.7 Measures to support later life career development

The lack of career guidance for older people is one of the foremost problems encountered by older workers in trying to find work. The need for guidance may be experienced when an older worker has lost his or her job or when transferring from an existing job to a new one. In all these circumstances, the lack of suitable career guidance can be a severe handicap. Career services tend to be oriented towards the young. Older people may wish to switch into a new career, or may have found their jobs unsatisfying and feel that they need a

¹¹ Report on Union Learn, 2018 Marchmont Observatory, University of Exeter

change to restore meaning and interest to it. There can be many different underlying factors. What measures were we able to identify, either in existence or as proposals, which the social partners might take up in social dialogue around active ageing? The following are some examples:

Table 53: What kinds of measures are there to support later life career development? (Observations by researchers based on contributions in workshops)

Spain	Italy	Poland	UK
Government programmes	Bilateral funds – training / development support	Solution catalogue	Mid Life career review

Spain: In the first quarter of 2017 there were 560,100 people over 55 who were jobless in Spain. 73.6 per cent of these had been unemployed for more than one year¹². According to the 2014-2016 Spanish Strategy for Activating Employment, the problem of long term unemployment is declining very slowly. Different programmes (*Renta Activa de Inserción, Programa de Recualificación Profesional, Programa de Activación para el Empleo*) have been launched since the beginning of the crisis, targeting diverse populations. The State Public Employment Service (SEPE) manages passive employment programmes. It deals with applications from long term unemployed people over 55 for an allowance for those whose rights to benefits have been exhausted. This allowance may continue to be paid up to the legal age of retirement (pension contributions being maintained during this period).

Active labour market measures are administered at regional level while their policy design is still made at central government level. More intensive and effective co-operation between the central government and regional authorities have been demanded repeatedly by the OECD. Andalusia is the region where most of the ASPIRE activities took place. In 2016 there were 258,200 people (55.3% men and 44.7% women) older than 50 unemployed in Andalusia (comprising 24% of all unemployed people from this age cohort in the whole country).

Even in Andalusia however, specific measures to support older job seekers are scarce. One the reason is the alarming youth unemployment rate: 48.7% in Andalusia and 39.5% for Spain as a whole. While national legislation provides that unemployed people of 55+ who have exhausted all sources of public subsidies are a priority group for active labour market policies, in reality little regional support is given for them in Andalusia. Moreover, those measures taken are included in the initiatives for the 45+ group as the priority for the older workers cohort. From the beginning of April 2011, the Andalusian government introduced a programme called the Integral Programme of Employment for 45+. This initiative includes a

¹² Fundación ADECCO, 2017

Personalised Insertion Itinerary (PII) for the older jobless group along with five different action streams including enhancing jobseekers' employability levels and various other measures including supporting self-employment and entrepreneurship. Incentives are offered to employers to employ 45+ long-term unemployed people under an indefinite contract. The Personalised Insertion Itinerary (PII) has become the main support mechanism for integration in the work market. During 2016 (Junta de Andalucía, 2017), a total of 2,6897 PIIs for 45+ jobless people were made (27.5% of all PIIs given in Andalucía).

In addition there is a specific programme, the IAP, provided for long-term unemployed workers (unemployed more than 12 months). In Andalusia 43.85% of all unemployed people in July 2017 were *long term* unemployed while a much greater proportion of 45+ unemployed were in the *long term unemployed* category (63.18% by the end of 2016). In 2016 only 428 people 45+ passing through the IAP initiative secured employment.¹³

The Professional Experiences for Employment Programme (PEEP) gives an opportunity to unemployed workers in Andalusia to participate in an internship (2-6 months) allowing them to get acquainted with habits, routines, and values of new work environments and sectors. During 2016, 14.73% (196 people, 66.8% of which were women) of all PEEP's participants were 45+.

Poland: An employer described an innovative approach to supporting employees, retain and enhance their knowledge and skills and increase the company's competitiveness.

"In 2014, a 'solution catalog' was created in our company. Its purpose was to support employees, help to preserve their unique knowledge and experience, but more broadly, it also increases the company's competitiveness towards other companies. Much energy was expended on this project - it was a good exercise in cooperation with the human resources department and the trade unions. I can also attest to an extraordinary measure of openness and trust by employees.

We had a series of focus groups made up of employees in the age range 45-55 and 55+. There were also superiors of these employees, retired employees (pensioners), former social partners and the analysis departments of our HR centers. We also included members of a team that deals with employees' health and a firm of external consultants who coordinated the entire program.

These were the six areas of interest we pursued:

- 1. Developing a mentoring and succession program.*
- 2. Mapping individual career paths for the employees' five years before retirement.*

¹³ Junta de Andalucía, 2017.

3. *Building database of employees and individual career paths.*
4. *Creating a suite of tools for managers and employees who supported this process.*
5. *Drawing up a retirement contract*
6. *Designing a "Plan your retirement" program that questions what you want to do when you retire"*

Based on the findings of the focus groups we were able to develop the "solution catalogue." The project, in our opinion, is well suited to the employees' needs. Its full implementation in its proposed shape has been supported by the involvement of the entire organization. It has demanded a complete change of approach in the company to increase consciousness of the value of the employees to the organisation. We believe that it was a much needed investment and that it can bring many benefits to both the company and employees."

UK: Over the last two years, nearly 3,000 people aged 45-64 have benefitted from a Government-supported pilot of the midlife career review run by NIACE /the Learning and Work Institute. Reviews were delivered by 17 partners including the National Careers Service Prime Contractors, voluntary organisations, learning providers, TUC Union Learn, Workplace Learning Advocates and Community Learning Champions. The reviews covered employment, training, financial planning and health issues, particularly focussed on people out of work, facing redundancy, or wanting to adapt to a new way of working.

More than 8 in 10 people felt their self-confidence and belief in their skills and experience were boosted, along with other positive outcomes. One third of those receiving a midlife review took action as a direct result. One in five found work after being unemployed, one in three felt motivated to find work, change career, or take up learning and almost half reported that they knew more about possible work or career opportunities as a result (figures provided by Learning and Work Institute)¹⁴.

Workplace union learning representatives were trained by Union Learn to administer the midlife career reviews. Materials were produced to support reps to encourage them to share and identify skills and hidden areas of knowledge which may be helpful in setting out on a new career. Union Learn has published an [evaluation report](#) on its section of the pilot.

37.8 Measures to support older people being recruited into new jobs or transferred in the organisation

Older workers generally find re-entry to the labour market difficult because they are not very likely to benefit from the same systems of gentle introduction and learning on the job which can be offered to younger workers. In contrast, an older worker tends to be expected

¹⁴ For more information [see the report on the pilot project outcomes](#)

to “hit the ground running.” Work experience programmes, job trials, mentoring schemes and forms of on the job training are among the kinds of support that may be encountered. We describe below some of the specific forms of support encountered in our workshops.

Spain: No measures to support job recruitment of older workers were presented during our interviews nor in the workshops. However, our research partner identifies the following organizations (other than social partners) which are engaged in the promotion of active ageing and support of senior workers:

- *“Observatory of 45+ Senior Work is a non-for-profit entity supporting 45+ adults who wish to continue their involvement in the work market.*
- *Memory in Motion between Young and Old (mYmO) is an association that promotes the active participation of older adults as an opportunity to support the younger generation and create a new shared leadership, stimulating intergenerational exchange. It focuses on social innovation projects aimed at raising consciousness and capacities of organizations around the management of age and generational diversity. mYmO is also a consultancy company working throughout Europe, with expertise in Senior Talent and Age Management and capabilities to design and customize programs to help other organisations, both public and private, to strategically manage their generational diversity and talent.*
- *Civic Platform against Age Discrimination gathers ten civic organizations to coordinate initiatives (such as the use of age-blind CV) aimed at removing and prohibiting all types of age discrimination.*
- *Some companies in the training, staffing and recruitment sector have also made commitments to support opportunities to enhance older workers’ employability. A long list of organisations is disseminating messages about the need to foster an age aware and multigenerational approach to management of human resources.”*

Poland: Research shows that it is much more difficult to restore an older employee to work than to keep him or her in employment. The following is an example of an employer who understands this message:

Employer: “We know the person’s plans and in return he also knows that he is well taken care of. If we hear that the person would like to work more we are also happy about it. There is no pressure to make someone leave. We come back and make an arrangement so that when they know they will want to retire we plan in advance and hire someone to become acquainted with the range of work they do.”

UK: There has been publicity in the UK for a new kind of apprenticeship offered to older entrants in Barclays Bank, to support older people back into the workforce. The “Bolder Apprenticeship programme” (principally aimed at the older worker) and the “Welcome Back

programme” to encourage individuals who have left the workforce to return. The Bolder Apprenticeships were launched in September 2015 as Barclays became the first UK company to extend its apprenticeship programme to over-24 year old people. Barclays say that age or social circumstance should not be deciding factors in selecting candidates to be admitted onto these training programmes. The Barclays Welcome Back programme helps senior-level women who’ve taken a multi-year career break return to work. The 12-week programme helps open doors, create networks and supports individuals as they rediscover their place within work. There are a number of companies which follow good practices in this way and examples are shared and recycled through the Business in Community Age Programme.

38. What can help?

38.1 Types of support favoured by workshop participants

In the workshops, all research partners discussed with participants the tools and other forms of support which could help them in future social dialogue. All our research partners received practical suggestions on the kinds of measures and forms of support which would be likely to support social partners in dialogue around active ageing. The table below summarises specific varieties of support in which participants expressed interest;

Table 54: What types of support did workshop participants want? (Observations of research partners).

Type of good support	Spain	Italy	Poland	UK
Manual of good practice	X		X	X
Tool to help develop the business case	X	X		X
Practical tools of any other kind – e.g. age audit.	X	X	X	X
Training package / course	X		X	X
Community / Network of practitioners	X			X

Comments and quotations on support needed for a social partnership approach to active ageing:

Spain: Commenting on the suggestion of a manual of good practice, a Human Resources manager opined: Human Resources Manager (Public Sector workshop): *“The best thing is something that other people have done and that works. That is the best example, because it has been implemented, it has been applied, it works. Well, if someone else has done it and it works, we can do it.”*

A trade union representative (Public Sector workshop) observed: *“If the company was aware of the situation that workers are going through in terms of the ageing process, (...) and could facilitate and train workers so that their job posts were adapted according to their age, surely it could save a lot of money.”*

Our Spanish research partner reported strong interest in practical tips, including advice “of a psychological nature,” orientated towards the motivation of older workers and encouragement to remain in the workplace as opposed to retiring fully.

Union Rep (Private Sector workshop): *“the motivation should be studied better. How might an older worker be motivated? Let’s think of a worker who is willing to leave, how to motivate him to stay and transmit his accumulated experience after all those many years working?”*

In response to the suggestion of a training course or package, a union rep commented (Public Sector workshop): *“We’d like to gain knowledge of policies and practices on active aging.”*

The Spanish workshops and interviews produced the following further suggestions on the content of the training module which the ASPIRE project aims to produce. It should contain:

- An explanation of the idea of active ageing and its connection with production environments.
- A presentation of the most relevant regulations and public policies in each specific environment that can be useful as references and also as tools for introducing the culture of active ageing in the workplace.
- Practical tips about personal care —physical, psychological, economic and social—for people growing older.
- Reflections on and specific examples for increasing awareness about the importance of paying attention to the ageing of a company's workforce.
- Ideas for bringing the issue of active ageing to the negotiating table, alluding to how other companies have done it.
- Practical strategies for tackling intergenerational conflicts and promoting solidarity among different generations of workers.

- Specific measures against age discrimination.
- Description of successful cases, at the national and international levels, of active ageing cases that may be inspiring.
- Specific mention of the topic of motivation and active ageing in the table of contents.
- Information about how actions that promote active ageing are being financed in other regions and countries.

Italy: Our Italian partners offered the following observations in relation to tools and support Manual of good practice - Employer's representative (Rome workshop 1): *It should be very useful to have access to collective agreements that contain active ageing measures in order to understand how they were implemented in practice.*

Tool to help develop the business case - There was some support for this idea.

Trade union representative, (Rome workshop 1): *"Creating a toolkit with case studies of good practices in the field of active ageing can be useful but it should include specific measures that could be taken as an example by the companies, including small and medium ones"*

Poland: Researcher's comment: *"The ASPIRE project has pursued the direct aim of designing a training module and guide to support the partners in social dialogue around active ageing. The project has required us to focus on getting more practical information for the training module. In general, we have found that participants (social partners) do indeed need such training. Their comments bear out this finding":*

Employer (Employers' Club): *"In the SME sector there is a strong case for training as small and medium sized enterprises cannot afford such "soft solutions," while investing in the learning of employees is definitely useful. For the same reasons, it is important to prepare such training properly and to promote it actively in advance. If this is done, I believe such training will be popular."*

Trade union rep (Poznan workshop): *"Training modules and workshops should provide a chance to learn good practices. It would be good if they provide case studies."*

Trade union rep (University of Lodz): *"I believe that a training module on this topic will be very interesting. We will look forward to receiving more information."*

Employer (Employers Lodz): *"Any training module needs to be delivered from a perspective that understands the challenges faced by employers and yet to encourage a better appreciation of the challenges facing their employees as people."*

UK: Both employers and trade union reps supported the idea of tools and good practice guides to assist the adoption of active ageing policies and practices. Views of the kinds of

support that would be most appreciated embraced all of the suggested forms in the previous table.

39. Concluding Comments

In this extensive report of our evidence, we have attempted to provide a reasonably comprehensive picture of the empirical evidence collected in the ASPIRE project's workshops and interviews in four partner countries, Spain, Italy, Poland and the UK. A thorough analysis and discussion of all our findings seems to be called for, though this is not the point at which to embark on such a task. The principal aim of this report at the outset, was to gather the evidence together in such a way as to enable conclusions and further discussion to proceed, informed by a thorough understanding of the lessons drawn from multiple workshops and interviews in countries with different traditions, legal and industrial relations systems.

The Summary Report will take our analysis and discussion of findings forward, in a shorter and more easily digestible document for most readers and comment on the answers we can now provide to our main research questions. (The interested reader is directed to the Summary Report and Executive Summary for more information.) We intend now to build on the present evidence base report, with academic articles, shorter journalistic comments and "blogs" as well as seminar presentations and in particular, the on-line good practice guide and training module. In this way the lessons of the ASPIRE project will be disseminated.

Our principal purpose in the ASPIRE project, was not simply, as a research exercise, to answer interesting research questions and provide material for future scholarship, but to gather information on successful (or unsuccessful) attempts to foster "active ageing" through the avenues of interaction between representatives of workers and employers – in word, "social dialogue". In this way, we aimed to enable the actors in the industrial relations systems of other countries, to glean something of practical value from the lessons we have learned. Rome of course, is never built in a day, but by capturing the words and experiences of union representatives and managers in four countries (none of which is especially recognised for its social innovation in this field) we will hopefully be able to spark some ideas for new and better approaches to this challenging process, fostering "active ageing through social dialogue." Hopefully, our findings and insights will have particular relevance for those who are engaging in social dialogue at the level of the employing organisation, the workplace or work unit.

Adopting strategic and effective approaches to foster active ageing will demand a combination of good policies at the level of the state, regional or local government in each country. Such a programme will require too, leadership and employer and union organisations that can influence others (including individual workers) to make changes, not simply in their working conditions and lives, but on a more private, personal level so that they are individually better equipped to meet the challenge of active ageing.

Other guides on management matters, (including guides to age management) often purport to offer “solutions” to this or that “problem” without clearly identifying what “the problem” is. Our approach however, has rested on a belief that problems and solutions can best be identified, understood and analysed through discussion between the chief protagonists – in this instance, the social partners – workers’ and employers organisations respectively. Hopefully therefore, while our evidence base will be a resource for further research it will help to illuminate ways in which reality may be given to the aim of “active ageing,” and in this way, give something back to those who have given their time so generously to participate in our workshops and research.

Thanks and acknowledgements

Much of this report has been assembled from reports elicited from ASPIRE project colleagues, which have been fitted into the overall shape of the composite document. I acknowledge the role which all of the following have played as collaborators in a team effort.

They are from Spain, Mariano Sanchez and Pilar Diaz; from Italy, Paolo Tomassetti and Silvia Fernandez and from Poland, Izabela Warwas, Justyna Wiktorowicz, Piotr Szukalski and Bogusława Urbaniak.

As far as possible, their comments, as well as those of all our workshop participants, have been replicated unchanged - though in some instances, some editing of language has been necessary for clarity. (Any blemishes or misunderstandings that have arisen as a result are down to me). Thanks are due to everyone for going the extra miles to answer points. I apologise for any irritation my insistence may have caused at times.

I am especially grateful to my colleague in the UK, Professor Matt Flynn, Principal Investigator in the project, for guiding me (an older worker in a later life career transition) through the practical challenges this sally has entailed, and to Newcastle University Business School and its staff who have provided both a home for the project and important practical support.

While this report represents only part of the project’s outputs, it behoves me, on behalf of the whole team mentioned above, to pay thanks to all those who have assisted us with our quests for evidence, by meeting us for interviews and participating in our workshops. I hope that in time they will feel it was all worthwhile.

Chris Ball

March 2019

Appendix 1

Workshops Held in Partner Countries

Country	Social partners	Industry	Participants
Italy	Unions and employers	Agriculture	Confagricoltura, CGIL
Italy	Unions and employers	Public sector	FIPE, CISL
Italy	Unions and employers	Steel	Steel firm
Italy	Unions and employers	Chemicals	Assosistema and FEMCA CISL
Italy	Unions and employers	Mixed	Confcooperative and FIRST-CISL
Poland	Employers	Mixed	FOB
Poland	Unions and employers	Mixed	Lodz SP
Poland	Unions and employers	Mixed	Pracodawcy
Poland	Unions	Mixed	Warszawa
Poland	Unions and employers	Mixed	Falenty SP
Poland	Union and employers	Mixed	Olsytn region SP

Poland	Unions and employers	Mixed	Falenty SP
Spain	Union and employers	Manufacturing	Andalusian SP
Spain	Union and employers	Education	Andalusian SP
Spain	Union and employers	Leisure, sports and tourism	Andalusian SP
Spain	Union and employers	Social health and education services	Andalusian SP
UK	Union and employers	Higher education	University of Hull and UCU
UK	Union and employers	Public sector	HMRC, PCS and FDA
UK	Employers	Construction	IOSH
UK	Employers	Health and social care services	Humber Paramedic Services
UK	Employers	Mixed	CIPD, North East LEP
UK	Employers	Mixed	Humber LEP
UK	Employers	Mixed	City of London
UK	Unions	Construction	UNITE
UK	Unions	Finance	UNITE

UK	Unions and employers	Health, social care and voluntary services	UNITE
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Appendix 2

Interviews Held in Partner Countries

Spain

Interview #1

Date: 25 July 2017

Location: Faculty of Human Resources and Industrial Relations, University of Granada (Granada)

Interviewee: Union rep.

Interview #2

Date: 25 July 2017

Location: Company's headquarters (Granada)

Interviewee: Employer.

Interview #3

Date: 6 September 2017

Location: Faculty of Human Resources and Industrial Relations, University of Granada (Granada)

Interviewee: Union rep.

Interview #4

Date: 15 January 2018

Location: Company's headquarters (Mengíbar, Jaén)

Interviewee: Employer.

Italy

To be listed

Poland

To be listed

UK

Discussions with the following respondents:

- Trades Union Congress, Scarlett Harris Equalities Officer
- Employers Network on Equality and Inclusion, Alan Beazely Engagement Officer
- UnionLearn Jane Warwick Project Manager
- EEF Manufacturing Employers Association Tim Thomas Director Employment Regulation and Skills Policy and Verity Davidge, Head of Education and Skills Policy EEF / Make UK
- EEF Manufacturers Employers Association Terry Woolmer (Head of Health and Safety Policy)
- Occupational Health Physician BUPA Martin Davidson
- ACAS Emma Slaven Senior Adviser/Conciliator

Appendix 3

Summary Chart of Barriers and Facilitators to Active Ageing

Barriers	Barriers	Barriers	Barriers	Barriers and facilitators	Barriers and facilitators
<p><i>National</i></p> <p>Low levels of awareness of Joint Declaration</p> <p>Lack of collaborative culture in UK context</p> <p>Lack of social dialogue on work processes</p> <p>Older unemployment</p> <p>Regional economic disparity</p> <p><i>Organisational</i></p> <p>Work intensification-no time for planning</p> <p>Low levels of unionisation-patchy framework for collective bargaining</p>	<p><i>National</i></p> <p>Constant changing of pension system</p> <p>Should be more government’s responsibility</p> <p>Lack of communication on ageing</p> <p><i>Organisational</i></p> <p>Lack of availability of “sheltered” jobs</p> <p>Loss of professional roles</p> <p>Perception that young workers are cheaper</p> <p>Short term pressure over-riding sustainability</p>	<p><i>National</i></p> <p>Lack of legal instruments for introducing active ageing</p> <p>Unpopularity of partial retirement incentives</p> <p><i>Organisational</i></p> <p>Lack of awareness</p> <p>Difficulties with legal and social policies</p> <p>HR policies</p> <p>Difficulties in adapting workplaces for older workers</p> <p>Difficulty reconciling active ageing with productivity</p> <p>High costs of adapting</p>	<p><i>National</i></p> <p>Lack of awareness of statutory legislation</p> <p>Government incentives favour employers retiring older staff early and hiring young workers</p> <p><i>Organisational</i></p> <p>Not a top priority of organisations now</p> <p>In many sectors, ageing historically managed through early retirement paid for by sectoral funds paid by companies</p> <p>Lack of public policies led companies to to</p>	<p><i>National</i></p> <p>Low levels of awareness of active ageing regulations (although UK mainly playing out in terms of EU declaration and policy)</p> <p>Patchy reach of social dialogue</p> <p><i>Organisational</i></p> <p>General acceptance of importance of active ageing but not a top priority for businesses</p> <p>Short term pressures dominate. Managers don’t have time for long term planning</p>	<p><i>National</i></p> <p>Early retirement/pension incentives (early retirement incentives still dominate in Spain and Italy; not in UK; mixed in Poland)</p> <p>How coordination occurs/active ageing is disseminated through management/union chains (Spain/Italy top down; UK/Poland bottom up)</p> <p><i>Organisational</i></p> <p>Different ideas on how easy/difficult to retain older workers</p>

<p>Employers preference for young workers with more recent skills Changing nature of work making older workers' skills redundant Reluctance to have difficult conversations SMEs lacking HRM policies/collective bargaining Senior managers not seeing as big issue Accommodations for older workers being perceived by others as special treatment Work intensification and lack of time for planning Managers worried about talking about retirement due to abolition of DRA</p>	<p>Supervisors intensifying work Employer giving early severance and rehiring on consultancy basis <i>Individual</i> Lack of trust in the pension system due to constant change Social expectation of early retirement given changes to retirement ages Need for older people to take care of elderly Demand for strongest/fittest staff Burn out Inequalities in work context Assumptions about older workers' desire/ability to work</p>	<p>Lack of awareness Continued encouragement of early retirement Selecting who will get help and who won't Redundancy costs sometimes less than keeping older workers Rigidity of HR policies in the public sector <i>Individual</i> Adaptation is perceived as labelling Fear of being made redundant Feeling barely hanging on and fearing engaging with managers Low motivation for planning retirement Facilitators <i>National</i> <i>Organisational</i></p>	<p>rely on early retirement to manage age Short-termism making it difficult to make active ageing a priority issue SMEs have culture of informality over looking formal needs like for training Some concern from unions that employers managing age unilaterally causing dualism (only most profitable companies willing to invest) <i>Individual</i> Workers' attitude to change mixed Resistance to downshifting (eg fear of being singled out)</p>	<p>Particular problem for SMEs Work intensification making active ageing difficult Different pressures by sectors Need for business case for organisations <i>Individual</i> Workers uncertain of their pension rights/responsibilities Lack of preparation for working longer Concerns over active ageing and older women Inequalities within older workforce Importance of work as part of life generally Fear of older workers being pushed out of work</p>	<p>Perceptions on whether older workers are too costly to retain Employers willingness to use early retirement as management tool (UK is less common but other 'push' approaches pervasive) <i>Individual</i> Expectations of older workers about having to work longer</p>
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<p>Lack of dialogue on the subject Worries about treating older workers like a special group Unintended biases in relation to recruitment Difficulty demonstrating the business case for investing in older workers within the context of short term profitability Reliance on agencies to provide staff Managing staff on call Two tiered workforces with older workers being passed over for younger colleagues with qualifications Contracting out making it difficult to offer older workers alternative work</p>	<p>Some workers unable to continue in work (tired/worn out) Work intensification Women with career interruptions Facilitators <i>National</i> <i>Organisational</i> Acceptance of ageing as an organisational issue by boardroom “Nothing new” in active ageing- senior managers always want to pass knowledge onto younger Concerns about labour shortages <i>Individual</i></p>	<p>Increased awareness of importance of active ageing Recognition of the potential for workforce management Emphasis on not discriminating on the basis of age Job adaptations which have been tried at the individual level <i>Individual</i> Some older workers not being able to afford to retire (eg not full pension contributions)</p>	<p>Some worker perceptions that older workers paid more for doing less Younger workers perceiving having to make up for older workers’ lack of productivity due to absenteeism <i>Industrial relations</i> IR is usually conflictual Not part of the social agenda Unions’ ability to influence depends on representative power which is declining Trade unions traditionally seen as uniform class needing single response in terms of rights and T&C</p>	<p>Lack of opportunities to change jobs in later life</p>	
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<p>Some managers report more constructive work relationships than other parts of Europe</p> <p><i>Individual</i></p> <p>Rising pension ages creating inequalities especially in relation to gender, income and sector</p> <p>Generally, work is becoming more precarious for man older workers</p> <p>Individualisation of learning and accreditation (eg construction)</p> <p>Impact of childcare and career interruptions</p> <p>Impact of health on work- back problems, poor diets, stress, etc</p>			<p>Facilitators</p> <p><i>National</i></p> <p>Civil code allowing employers to use bilateral funds for job rotation and job change (but some reluctance from employers given resistance from employees to downshift)</p> <p>Intergenerational Solidarity Pacts:facilitating job sharing and knowledge transfer (but poorly implemented can encourage early retirement)</p> <p><i>Organisational</i></p> <p>Companies focusing on active ageing as it affects productivity</p> <p>Skill shortages driving change according to employer association</p>		
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<p>Difficulties discussing age related problems with managers</p> <p>Perceived reluctance of older workers to train</p> <p>Women expecting/planning toward retiring at 60</p> <p>Career interruptions and impact on career path</p> <p>Older people being knocked off course because of changing family or work circumstances</p> <p>Fear of being singled out as less than committed</p> <p>Agency workers receiving little support</p> <p>Not being able to afford to retire</p>			<p>Tradition of strategies emerging from the shop floor</p> <p>Workers wanting action</p> <p>Idea of sustainability important</p> <p>Employers (especially large ones) diversifying work roles and more likely to see older workers as needing specific types of support</p> <p><i>Individual</i></p> <p>Company 'big city'-location of social interactions</p> <p><i>Industrial relations</i></p> <p>Some sectors have bilateral projects embedded in IR and have a cultural of sustainability (</p>		
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<p>Precarious work and reluctance to ask for help</p> <p>Long working hour culture in some sectors</p> <p>Being knocked off course because of job restructuring/change in the organisation</p> <p>Fatigue and being fed up</p> <p>Facilitators</p> <p><i>National</i></p> <p>Some employers starting to feel the pain of demographic change</p> <p>Lack of young/middle aged workers in labour market</p> <p>Regional focus on age inequalities</p> <p>Concerns over impact on regional development</p> <p>Worries over Brexit</p>					
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<p>High level of awareness of UK government policies on active ageing- raising real retirement ages, abolishing mandatory retirement,</p> <p>Some regional activities to promote active ageing through collaboration between stakeholders</p> <p>Different drivers for managing age:</p> <ul style="list-style-type: none"> -Manufacturing: Old current workforce, skills shortages - Finance and retail: skills shortage, turnover -Higher ed some career blockage <p>Demand for skills due to lower migration</p>					
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<p>Major initiatives on career transitions (unionlearn, mid-career reviews)</p> <p>Pension system encouraging (forcing?) longer working lives</p> <p>Apprenticeships to get older workers into work</p> <p><i>Organisational</i></p> <p>Desire to retain key skill</p> <p>Facing a large cohort of staff about to retire</p> <p>Employers having to recruit from larger pools of workers</p> <p>Lack of availability of young people for apprenticeship roles</p> <p>Difficulties some employers face in retaining young staff</p>					
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<p>Reemergence of demand for some traditional skills</p> <p>Employers making use of older workers in mentoring and upskilling younger</p> <p>Perception of 'retired' workers' flexibility</p> <p>Unionlearn and the role of reps facilitating learning and career planning</p> <p>Unions' role in community based activities (supporting non-traditional workers in sustainable work)</p> <p>Unions' role in promoting decent work</p> <p><i>Individual</i></p> <p>Recognition that people are <i>generally</i> living healthier longer lives (although still great inequalities)</p>					
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<p>Changing lifecourses (people starting families, buying home, etc at different times) Work is part of identity- providing social networks, life structure. Leaving work for some can represent a real loss Life planning Some older workers having good networks to find work</p>					
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Appendix 4

Coding Structure for Thematic Analysis

The following is the draft coding structure agreed between the partners for use in the thematic analysis of workshops and interviews. In practice, not all of the nodes and sub-nodes were used and there was variation in the extent to which each node/sub-node was deemed to be relevant in each country. In a few instances, third level nodes were created to embrace unanticipated focuses of discourse. (These are not shown in the basic coding structure below)

1. Barriers and facilitators to active ageing
 - a. Barriers-
 - i. Industrial relations systems- Ways in which institutional system (e.g. collective bargaining, works councils etc) impact on dialogue on active ageing.
 - ii. Macro-economic issues (eg unemployment, economic restructuring)
 - iii. Legal or social policy issues (impact of employment laws, pension ages, etc)
 - iv. Sectoral issues (skills or labour demands)
 - v. Organisational issues (HR policies, workforce management)
 1. HR policies
 2. Ergonomics
 3. Workforce management
 - vi. Union issues (union policies, campaigns)
 - vii. Individual issues (retirement plans of staff, health issues, expectations)
 1. Health
 2. Finance
 3. Family/caring
 4. Retirement plans
 - b. Facilitators
 - i. Industrial relations systems
 - ii. Macro-economic issues (eg unemployment, economic restructuring)
 - iii. Legal or social policy issues (impact of employment laws, pension ages, etc)
 - iv. Sectoral issues (skills or labour demands)
 - v. Organisational issues (HR policies, workforce management)
 1. HR policies
 2. Ergonomics
 3. Workforce management

- vi. Union issues (union policies, campaigns)
- vii. Individual issues (retirement plans of staff, health issues, expectations)
 - 1. Health
 - 2. Finance
 - 3. Family/caring
 - 4. Retirement plans
- 2. Perceptions of active ageing
 - a. Definitions of active ageing
 - i. Level of understanding
 - ii. Perceptions of work as part of active ageing
 - b. Organisational perceptions
 - i. Corporate policies
 - ii. Line manager perceptions
 - iii. Workers' perceptions
 - c. Union perceptions
 - i. Union movement policies and campaigns
 - ii. National union policies
 - iii. Perceptions of union reps
 - d. Regional body perceptions
 - i. Labour issues
 - ii. Impact on local economy
- 3. Responses to active ageing
 - a. Company responses
 - b. Union responses
 - c. Social dialogue approaches (ie coordination between two)
 - d. Regional coordination
 - e. Sectoral approaches to active ageing
- 4. Intergenerational issues
 - a. Concerns over intergenerational conflict
 - b. Perceptions of younger workers
 - c. Intergenerational work teams
 - d. Mentoring
 - e. Intergenerational support
- 5. Good practice in active ageing
 - a. Collective bargaining
 - b. Healthy workplace initiatives
 - c. Recruitment/joblessness
 - d. Flexible working
 - e. Training/lifelong learning
 - f. Performance management

Appendix 5

Researchers Contributing to ASPIRE project

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