**ASPIRE TRAINING MODULE – Draft content [25th February 2019]**

**UNIT 1. Welcome**

**1.1. Introductory video clip.** [This piece prepared by Matt may be used by all partners to introduce the training module]

Europe is ageing. Over the next decade and a half, the proportion of the population which is over 65 will rise from one in five to one in four. In many ways, this represents a great advance in science, medicine, lifestyles and society because it means that many more people are living healthier and longer lives than in any previous times in history. Twenty years ago, there were five people in work for every one person at retirement age. Today, that ratio is three to one and by 2080, there will be only slightly more than two working aged people supporting one person in retirement.

This creates huge economic and social challenges for businesses, government and trade unions in terms of securing the long term sustainability of pension systems, ensuring skills and labour are available to meet business needs and helping older people pursue endeavours (both in paid work and outside of it) while at the same time supporting young people into work which is secure, fulfilling and provides a decent wage.

Older workers can be an asset for the businesses they work in terms of filling labour gaps, contributing their skills to business challenges, and passing their knowledge to younger colleagues. In many parts of Europe, older workers are already delaying retirement and many employers are finding new ways to use their older workers experience through for example mentorships and knowledge management. In a survey carried out by the Centre for Research into the Older Workforce, ¿in the UK? over 80% of people 50+ said that they would be willing to delay their own retirement if they were in work which is rewarding and made good use of their capabilities.

And that really is the key to a workplace active ageing agenda: delivering work which older workers value and is intergenerationally fair. Here in the UK, there are about 1.5 million older people who are in jobs which are below their skills level, has fewer hours than they like or is well below their preferred salary levels. Underemployment is not only tragic for the older person, but represents a huge waste of skills and knowledge for the economy as a whole.

Older workers want a variety of things from work. While some people are happy in the work that they do and want to continue as long as possible, others want new challenges and help making a change in jobs through for example retraining. Many older workers are also carers for grandchildren, elderly relatives and sometimes both and need flexibility to balance home and work responsibilities. Around 2 in five people over 50 in work are living with at least one long term health condition but with some support from their employers in terms of how work is organised they can stay productive. Many simply want the chance to talk with someone- a career adviser or union representive to help them map out their plans before and after retirement.

Social dialogue can help deliver workplaces which can meet the challenges of an ageing labour market. This is why in 2017, European level social partners including Business Europe, ETUC, Eurocadres, CEEP, and the European Association of Craft, Small and Medium-sized Enterprises agreed a set of principles for delivering workplace active ageing and intergenerational solidarity. This is an agreement to implement national, regional, and company level initiatives to take a life-cycle approach to productive working. In the past, early retirement was a tool which employers, unions and governments used to deal with short term economic challenges like unemployment. All three stakeholders benefited- employers could shed staff with the oldest skills sets, governments could meet full employment targets by shifting older workers into inactivity, and unions could promise older workers routes to early labour market exit while making way for younger staff. Labour economist Bernard Ebinghaus called this a collusion to early retirement since all three stakeholders benefited in the short term even though the policy wasn’t really sustainable in the long term. Today, the challenge is to develop, pilot and embed new approaches to work which can help older workers stay in work which they value while also maintaining career pathways for younger workers.

This training module is meant to help union representatives and managers in meeting this challenge. It is based on research supported by the European Commission in four countries: Italy, Poland, Spain and the UK on workplace active ageing and social dialogue. We spoke with employers and unions in all four countries to learn from their experiences in managing workplace ageing. They shared idea, examples of good practice and processes for starting a dialogue on active ageing which takes into account both the demands of the business and needs of the workers. This training module shares these examples with case studies, interviews with stakeholders, signposting of valuable resources and a community of practice in which union and employer representatives can share ideas with one another. Our target audience is not only the senior manager or national union official, but also the social partners at the workplace level. Often the best ideas come from the shopfloor as union reps and managers work together to solve a problem facing their particular workforces.

We hope you enjoy this training module and learn from it. Before you start, we would like you to take part in a short introductory quiz to gauge your understanding of workplace active ageing.

**UNIT 2. Active ageing and social dialogue. What are we talking about?**

## 2.1. Active Ageing: An initial quiz

With this quiz we hope to get to know some of your initial thoughts about active ageing in the workplace. Completing the quiz will only take about 5 minutes. There are no right or wrong answers. Responding honestly will help us develop relevant active ageing actions in your organization. Read each bold sentence and check (✔) one of the 5 boxes to its right. Some sentences are accompanied by a quotation from ASPIRE’s fieldwork on this issue.

Your answers are anonymous and will remain confidential. Thank you for your collaboration.

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| --- | --- | --- | --- | --- | --- |
| **Introductory quiz on active ageing** | **I strongly disagree** | **I disagree** | **I neither agree nor disagree** | **I agree** | **I strongly agree** |
| **ACTIVE AGEING CHARACTERISTICS** |
| 1 | **"Active ageing has to do only with older workers"**“*There are two typologies of ‘active ageing at work’ policies: those that support older workers in the transition to early retirement in order to promote intergenerational exchange and those active policies at work designed to help older workers stay in their job longer.”* (trade union rep) |  |  |  |  |  |
| 2 | **"Work and employment are central to active ageing"***“I think that active ageing does not have to go hand in hand with employment; individuals who have finished their working lives can age very actively without having to be in the labour market.”* (employer) |  |  |  |  |  |
| 3 | **"Active ageing is the natural consequence of governmental policies to raise the age at which people can receive their state pension"***“People generally see active ageing as a kind of punishment that the government imposes on companies because it does not have the money to pay state pensions.”* (trade union rep) |  |  |  |  |  |
| **ACTIVE AGEING CULTURE** |
| 4 | **"An early retirement culture is incompatible with an active ageing culture"***“So far we have perceived or we have looked for ways to make someone leave the workplace before retirement. This shows a lack of understanding of active ageing, and in fact goes in the opposite direction."* (line manager) |  |  |  |  |  |
| 5 | **"Active ageing must be included in social dialogue and collective agreements"***“Responding to the needs of this segment of the population (older workers) poses an additional problem but at the same time it can be an opportunity to include new provisions in collective agreements, for example, work-life balance, smart working and different modalities of flexible working.”* (trade union rep) |  |  |  |  |  |
| 6 | **"Social partners (unions and employers) must take active ageing seriously"***“Until now the issue [of active ageing] has not been on the table. [What we must do] is help people develop the culture of active ageing and put this culture at the centre of our claims.”* (HRM) |  |  |  |  |  |
| **OWN KNOWLEDGE AND ATTITUDE** |
|  | **I am already somewhat knowledgeable about active ageing** |  |  |  |  |  |
|  | **I am/have been involved in an active ageing at work initiative** |  |  |  |  |  |
|  | **I think that extending one's working life should be an option, not an obligation** |  |  |  |  |  |
|  | **I am interested in hearing more about active ageing** |  |  |  |  |  |

## 2.2. What is Active Ageing? A couple of institutional concepts

Active ageing can mean many different things and it is used in many different institutional contexts. In fact, the term should really be plural instead of singular. Because different institutions have different understandings of what active ageing is and what it entails, it can be helpful to look at some examples. {0>A brief review of institutional conceptualizations of active ageing.<}0{>Below we provide a brief review of institutional conceptualizations of active ageing.<0}

The European Commission

The document entitled *The EU Contribution to Active Ageing and Solidarity between Generations*, published by the European Commission in 2012, says that active ageing principally means three things (bold and underlined emphasis added):

1. Enabling both women and men **to remain in employment longer** – by overcoming structural barriers (including a lack of support for informal carers) and offering appropriate incentives, many older people can be helped to remain active in the labour market, with systemic and individual benefits.

2. **Facilitating active citizenship** through enabling environ­ments that harness the contribution that older women and men can make to society.

3. Enabling both women and men **to keep in good health and to live independently** as they grow older, thanks to a life-course approach to healthy ageing combined with adapted housing and local environments that allow elderly people to remain in their own homes as long as possible.

According to the European Commission, the only way that Europe will be able to meet the challenges of demographic change is through active ageing. This concept was developed mainly in regard to older people.

The United Nations Economic Commission for Europe and the World Health Organization

In the same year, 2012, the United Nations Economic Commission for Europe (UNECE) released a policy brief on active ageing. The concept used in the brief is based on the broader view of active ageing put forward by the World Health Organization (WHO) (bold and underlined emphasis added):

“Active ageing is the process of **optimizing opportunities for health, participation and security** in order **to enhance quality of life** as people age. […] Active ageing allows people to realize their potential for **physical, social, and mental well-being** throughout the life course and **to participate in society**, while providing them with **adequate protection, security and care** when they need it.” The definition strongly associates with the **well-being of individuals**. However, the well-being of persons is not only an individual luxury, but has an ultimate societal dimension in terms of an **increase in labour market participation** and a **decrease of health care expenditures**, for instance.

This concept of active ageing brings together various social and political domains: labour market participation, social inclusion, and health. It is concerned with people as they age. Recently, WHO has changed its focus from ‘active ageing’ to ‘healthy ageing’ (the latter concentrates on functional ability and well-being in older age).

Lessons learned

* Active ageing is not just about working longer. It is mainly about ageing better.
* Employment needs to be combined with other dimensions, such as social participation, health and security, to make active ageing possible.
* Active ageing is not only about the well-being of older people, but about the well-being of individuals as they age, i.e. throughout their lives.
* In practice, active ageing requires collaboration between responsibility and choice at the individual level and society’s effort to make available resources and opportunities to age actively.
* Active ageing should never be an obligation but rather an option. Ageing actively is not the only way to age well.

## 2.3. Why is the subject of Active Ageing important for social partners?

As a result of demographic evolution and the trend towards a higher quality of life in all the countries of the European Union, the ratio of younger age groups to older age groups has changed, with the latter taking on a more central role in quantitative terms. This alteration in society's age structure is visible in the job market as well, because the average age of workers in companies is increasing significantly. In fact, it is expected that in just a few years a high percentage of the workforce will be made up of older workers.

Demographic data and indices corroborate the foregoing. Take for example the projections made by the Organization for Economic Cooperation and Development, which forecast that the proportion of workers between the ages of 45 and 64 with respect to the total population of workers (ages 14 to 64) will be 41.3% in the year 2025. This means that by then almost half of all workers will be over age 45.

Nonetheless, at this time older people’s participation by older people in the European job market remains low, and many workers leave the job market at relatively early ages. In recent decades it has become a common practice for companies to rejuvenate their personnel by means of early retirement programmers and incentives that encourage older people to stop working. In the European Union, the mean percentage of persons who are inactive due to retirement between the ages of 50 and 74 continues to be very high (65.8% in 2017) and it has barely fallen in the past decade.

This panorama is having significant effects on multiple dimensions of social and economic life, especially in terms of the composition of the job market and the orientation of social protection systems (especially pensions, healthcare and services for the elderly). For this reason the EU has taken various steps to foment Active Ageing (AA), the aim of which is to increase the participation of older workers in the job market.

In a context such as this one it is important to develop and implement comprehensive and effective AA strategies that tackle the main barriers preventing the participation of older workers in the job market. We are talking about suppressing incentives that encourage an early end to productive life, stimulating employment among older people and seeing that conditions are in place to allow workers to continue working effectively for as long as possible. And also helping older workers update their skills and avoid the problem of their competences becoming obsolete, which will allow them to preserve and improve their work capacity.

The underlying idea is to establish an AA culture that stimulates development and brings with it new opportunities for economic growth. And this is in the best interest of all social partners.

What has been done so far to make AA a reality? Is there dialogue between job market agents to incorporate AA? One response by governments and social partners to the problems arising in relation to the ageing of Europe's active population has been the creation of a framework agreement. This agreement is intended to facilitate both the participation in the job market of older workers up to the age of retirement and also to promote an intergenerational approach. Representatives of businesses and workers —specifically, BusinessEurope; the European Association of Craft, Small and Medium-Sized Enterprises; the European Centre of Employers and Enterprises; and the European Trade Union Confederation— signed this agreement on March 8th 2017. It seeks to increase the number of workplaces that are healthy, safe and productive for all workers until the legally established age of retirement. The agreement suggests interventions concerning health and safety at the workplace, such as the following:

* Adjustment of work processes and workplaces;
* Re-distribution/allocation of tasks to workers;
* Effective prevention strategies and risk assessment, taking into account existing legislative obligations, including training of all workers on health and safety rules at the workplace;
* Voluntary health promotion including, for example, awareness-raising actions;
* Knowledge-building among management personnel at the appropriate levels in order to address challenges and possible solutions in this field;
* Health and safety measures taking account of the physical and psychological health of workers;
* Review of health and safety measures by management and health and safety representatives, in accordance with existing legislative requirements.

This agreement is a good example of how social dialogue and intervention by social partners can contribute to the construction of a suitable framework that facilitates and promotes productive activity among older workers.

**UNIT 3. Barriers and facilitators. What to do?**

## 3.1. Changes in the labour market [Barrier]

**Identified Barrier: An increasing part of labour force has reached 55 years of age**

European societies are ageing at a rapid pace which is best illustrated by the increase in the number of people aged 65+ per 100 people aged 15-64 (old-age dependency rate). While in 2006, in the EU28 there were 25 people at the age of 65+ per hundred people aged 15-64, in 2017 there were almost 30, and in 2050 there will be more than 50. The progressive demographic ageing of the population is accompanied by the ageing of the labour resources at the age of 20-64. An increasing part of labour force aged 20-64 has already reached 55 years of age. On average, in the EU28 there were 17.3% of them in 2017 – an exceptionally high percentage, over 20%, can be found in Germany and Lithuania (Graph 1). These significant changes are demonstrated by a high growth rate of the share of people aged 55-64 among those working in the entire EU – in 2000, this group constituted only 10% of people aged 20-64.

Graph 1. Number of people at the age of 55-64 as a percentage of total employment of those aged 20-64 in the EU28 in 2017



Source: Own calculation based on Eurostat lfsi\_emp\_a

There are versatile reasons underlying the increasing professional activity of people aged 55-64. As a result, more and more of them decide to continue their career – in 2005 in countries such as Austria and Slovakia no more than 30% of people aged 55-64 remained in employment whereas in 2017 – at least half of them. The highest percentage is reported in Sweden – 76.4% and Germany – 70.1% (Graph 2). The lowest professional activity of older employees can be noted in Greece (38.3%) and Luxembourg (39.8%).

Graph 2. Number of people remaining in employment at the age of 55-64 as a percentage of total population at the age of 55-64 (employment rate of older workers) in 2005 and 2017 in the EU country members (only countries where employment rate exceeded 50% in 2017).

Source: Eurostat: tesem050

The mentioned above differences are related to specific national labour policies and to specific pension requirements. The consequence of the ageing labour resources in EU countries is the employers’ awareness that not only it will be increasingly difficult for them to find middle-aged and younger employees, but also they will have to deal with workers who are at least 50 years old. They are a valuable human capital for the company, they know its corporate culture.

The situation of 55+ people in the labour market seems quite good since the unemployment rate in 2017 was on average lower among the elderly than the younger in the EU28 – 5.9% among people aged 55-59 and 5.6% among those who are 60-64 whereas 16.8% and 10.0% among the young people aged 15-24 and 25-29 respectively. However, a job loss after the age of 55 is associated with great difficulties related to finding a new employment. As a result, the group of older people includes a significant percentage of long-term unemployed and so-called discouraged workers, i.e. those who grew frustrated by the long-term fruitless search for employment and thus withdrew from the labour market and chose inactivity instead. If they succeed in finding a job again, they get on average 25% less than before (calculations for the US labour market in 2018). It is estimated that in the US 15% of college-educated older workers are doing low-paying jobs.

**A possible solution: Better information, analysis of the ageing employees’ impact on the employment by occupation and specialities – a long-term approach**

According to the **Directive of the Council of the European Union 2000/78/EC on equal treatment in employment and occupation** as well as the implementation of one of the **Autonomous framework agreement on active ageing and an inter-generational approach** goals – *Increasing the awareness and understanding of employers, workers and their representatives of the challenges and opportunities deriving from demographic change*, it is the trade unions’ interest to make an effort to maintain ageing employees in employment.

Therefore, trade unions should draw attention to the situation of 55+ people in the organisation, participate in the talks with the management about possible shifts of older employees to other jobs within the organisation and strive to minimize the possibility of older employees’ dismissal. In addition, they should rise the older workers’ awareness of both their rights and risks they are exposed to in the labour market due to their age.

**Questions to consider**

* Is the structure of employees known (including women and men by age and posts occupied in the company)?
* Are there any employment projections by age that include the demand for employees in various occupations and specialities?
* Are there any steps taken to protect the company against the possibility of the shortages of employees (vacancies) due to retirement (succession of generations)?
* What methods are used in the company to protect it against the possibility of labour demand and supply imbalance caused by age?
* Is it possible to ensure the substitutability of generations at work posts in different periods of time?
* What are the possibilities of satisfying employment needs threatened by the employees’ progressive ageing in the workplace?

## 3.2. Workers’ health, mental, physical conditions [Barrier]

**Identified Barrier: Workers’ health, mental and physical conditions**

**Description:**

Age-related physical and psychological changes comprise a natural consequence of employees’ aging and as such can be noticed in the entire population of aging people. Furthermore, they may affect the quantitative and qualitative outcomes of work, accidents at work, sickness absence, and thus the costs incurred by employers. Functional and sensory impairments or chronic diseases which increase with age pose a number of potential threats that older workers are exposed to. Some of them can be weakened by the proper equipment or workplace adjustments, others, such as signs of early dementia (onset of pre-dementia earlier in time) or mild cognitive impairment, are difficult to determine. This is especially disadvantageous when a senior employee works on a job requiring high-level mental functioning where high competences related to intact cognition (mental process of knowing, including aspects of awareness, perception, reasoning and judgment) constitute one of the requirements. This can be counteracted, yet only to some extent, through an increased both physical and intellectual activity as well as other lifestyle-related factors. The increasing risk associated with workplace hazards involving older employees may be weakened by compensatory strategies or experience. In older age, especially among women, falls tend to intensify and lead to a greater morbidity and mortality. In addition, the probability of falls among older employees increases due to other factors such as strokes, dementia, cataracts, age-related macular degeneration and others. The aerobic capacity is reduced and this is related, among others, to weight gain among people over 50 years of age; the incidence of chronic neck and shoulder pain, musculoskeletal complaints and many others increase together with the employees’ age. These changes are of great importance to those whose work not only requires constrained postures but is also connected with physically demanding jobs with heavy manual work. Overall, the health of the older workers and the quality of employment are interrelated, especially in the case of the lack of support at work and the feeling of job insecurity. Health-related barriers hinder the introduction of AA practices in the workplace and force the management to devote greater and individual attention when it comes to providing solutions aimed at supporting older employees.

**Example – how to overcome the barriers ?**

Zofia, 58, was employed as a cleaning lady in the office of company X. Her manager noticed that mopping the floor started to be even more difficult than usual. Therefore, the company bought a cleaning machine for Zofia which eased the process of cleaning the room. Later, the manager noticed with surprise that Zofia does not use the cleaning machine and continues to do her work as before. Zofia provided no answer to the question why she rejects to use the cleaning device. Yet soon, she explained that she cannot read the instruction manual because everything is written in a very tight and small font she cannot read even when she is wearing glasses. The manager asked someone from the office to rewrite the instructions using a large font and with large intervals, and then, together with Zofia, they started the cleaning with a cleaning machine for the first time. Moreover, Zofia visited an ophthalmologist who checked her vision and advised the exchange of lenses. The problem has been solved.

**A possible solution:**

* Trainings among older employees on risks connected with ageing in the workplace and solutions offered by employers to facilitate problem solving;
* Introduction of changes in the work environment and organization to reduce the likelihood of recurrent falls;
* Paying attention to preventive medical examinations among employees covering a wider profile of health threats connected with age;
* Promoting physical and intellectual activity among all employees, especially among those 50+;
* Promoting a healthy lifestyle (including nutrition) among all employees, especially among those 50+;
* Consultation with a physician about reduction of medications (polypharmacy, i.e. 4 or more medications can be considered a risk factor when it comes to e.g. falls in the workplace);
* Ergonomic adjustment of workstations to the requirements of aging employees,
* Introducing breaks at work devoted to stretching exercises;
* Selection of the type of work – job characteristics such as job demands and job control can have an impact on depression and/or anxiety in working older populations;
* Preparation of instructions, documents, explanations, warnings in the workplace written in large fonts, to make them easier to read by older employees and which will improve their feeling of a job security; presbyopia usually occurs among people aged 45 to 65 and it is manifested by an impaired short distance vision;
* Due to the age-related hearing loss, it is necessary to communicate with older employees in a slower, slightly louder and clear manner;
* Advising older employees on how they can make use of their professional experience, developing individual strategies targeted at coping with versatile occupational situations when advancing age becomes an obstacle in the performance of tasks at the workplace.

**Questions to consider:**

* Do occupational health physicians pay attention to the impact of aging processes on the functional abilities of employees in your company?
* Do the older employees know who they can turn to for help when, because of their age, they face difficulties in completing tasks at their current job position?
* Is the older employees’ acknowledgement of the health problems considered a reason to justify the termination of their employment?
* When was the last time when the older employees had the opportunity to take advantage of a health services package tailored to their needs?
* Are the causes of sickness absence among older employees regularly analyzed in the company?
* Is the accident rate among older employees (especially recurring cases) monitored in terms of the preventive actions that can be taken by the company?
* Are the older workers offered the health rehabilitation opportunity the costs of which are covered by the company?
* Does the company co-finance trips to the sanatorium or spa for employees of all ages?
* Are there any training sessions on a healthy lifestyle?
* Are there consultations, trainings or counseling on healthy aging targeted at 50+ employees?

## 3.3. Strong installed culture favouring early retirement [Barrier]

Early retirement means stopping work before the normal retirement age. It goes against active aging when work exit is recommended with no alternative route for the worker to consider maintaining his activity. Recently, an OECD report has concluded that early retirement (including anticipated retirement, early retirement due to reduced capacity to work, and early retirement for labour market reasons) is still common in many countries as it is shown in the Figure 1:

**Figure 1. Early retirement among persons who receive an old-age pension (%)**



Source: OECD.

Under which circumstances do workers want to retire earlier? Typically, an early withdrawal from the labour market reduces pension rights and entails a financial penalty. Furthermore, leaving the work environment may bring negative consequences when people’s life has been structured for decades around their occupation. However, research has shown that there are several factors involved in the decision to leave the job market earlier such as the socio-economic background, job conditions, career length, (re)training opportunities, financial affordability of retirement, characteristics of retirement system, health status, shrinking labour demand at older ages, age-friendliness of working conditions, caregiving responsibilities, macroeconomic conditions, and spouse’s working status. This is a long thought-provoking list which may be a good trigger for discussion: which of these factors have to do with industrial relations’ features that might be adapted to facilitate social partners’ dialogue on active ageing?

Findings from a 2012 European survey indicated that the average age up to which people expected to do their current job was 61.7 years. Some 42% felt that they could go on to 65 years and beyond, and only one in ten believed to be able to go until the age of 70 or beyond. Generally speaking, the idea of working longer is not installed yet in the social partners’ value system. Experts assert that European employers are often still opting for the easy way out, via exit strategies, instead of formulating strategies that promote active aging.

In fact, our own research has thrown some light on how installed is the culture prone to early retirement. For instance, in Spain social partners acknowledge that early retirement is still a valid way to get new, younger, and cheaper workforce. Companies’ collective imaginary understands that employees will do everything to work the least time possible. Therefore, employers’ and employees’ mentalities fit together around the advantageous character of early retirement in some instances.

Similarly to Spain, in Italy the majority of the companies prefer to facilitate early retirement for older workers. Actually, early retirement is still the main channel to deal with an ageing workforce in the country. Why? Because it is believed that hiring young workers is more economically convenient and these workers are more flexible at physical and mental level. However, it has been acknowledged that the latter mindset lives side by side with a fear that older workers whose professionality is hardly replaceable can have access to early retirement.

In the UK, while some older workers are able to extend working life beyond normal retirement age, many are still retiring early because of a health problem, work disruption or change in family situation. Major changes to work can lead older workers to choose to retire early rather if coping with change proves difficult.

## A possible solution: Better information, work conditions and training programmes

How to motivate workers who have been socialized in the culture of early retirement, to help them understand and be willing to consider possible extending their work lives?

Union representatives in the UK have argued that **interventions from employers to address issues of work intensification** could persuade some older workers to extend working life, but expressed scepticism that such support would materialise. They contended that older workers are fatigued by the increased intensification from work.

Italian unionists insist that **whatever line of action should reflect the conditions and interests of the single worker**. Therefore, just making exit routes increasingly restrictive disregarding the particular situation of the worker don’t seem to be an effective way forward in the right direction.

International discussions —some of them lead by OECD— on how to counter the early retirement culture through social dialogue initiatives have recommended implementation of measures like the following:

* **Improvement of available information:**
	+ To promote well-informed choices between work and retirement.
	+ To facilitate easily understandable information – especially to older workers with poor financial literacy – about the financial implications of early or late retirement.
* **Paying more attention to health conditions at work.**
* **Supporting training programmes for older workers to sharpen their skills:**
	+ In the specific case of low-skilled workers, facilitating job change in mid-career and at an older age would be desirable.
* Increasing opportunities for **more flexibility in work arrangements and retirement entry**, e.g. teleworking, part-time work, compressed work schedule, and formal phased retirement programmes.

In Poland, examples of highly negative consequences of early retirement in ‘uniformed’ professions have been underlined. Dissemination of these consequences may help workers to understand and appraise much better both pros and cons of early retirement.

In Italy, almost all participants in ASPIRE workshops recalled the role of collective bargaining in regulating Intergenerational Solidarity Pacts, which have been signed in several sectors. This scheme is also promoted by the legislator and, in some sectors, is supported by bilateral funds established by social partners at sectoral level. Although the main purpose is that of raising youth employment, they also promote the involvement of older people, by **creating a link between different generations**, in terms of skill transfer and creation of job opportunities. Facilitating opportunities for satisfactory intergenerational collaboration may be as well a means for older workers to reconsider their tendency to opt out of retiring earlier.

## Questions to consider

1. To what extent a culture favouring early retirement is installed in your particular work context?
2. Is detailed and friendly information on pros and cons of early retirement available for workers?
3. Have social partners explore measure for more flexible work arrangements and retirement entry?
4. Do we have in place instruments to address issues of work intensification among older workers properly?

## 3.4. Job adaptation as workers grow old [Barrier]

Companies tend to have a negative view of workers who pass the 50-year mark. In the business context, the most frequent concern associated with older workers is productivity in relation to costs, i.e. that the performance of older workers might stagnate while their salary continues to rise, or that their performance diminishes even though their salary increases. In both cases, loss of competences has often been put forward as the reason behind reduced productivity. Other disadvantages often attributed to these workers are the high cost of their salaries, the costs incurred by the company if these older workers are let go, and their purported resistance to change; older workers are also attributed with inadequate or obsolete training, lack of functional mobility, low motivation, resistance to geographic mobility, hindering the promotion of their younger subordinates, loss of physical capacity and higher rates of absenteeism. However, although such beliefs are very widespread, there exists little objective, empirical evidence that corroborates them.

In many cases, these beliefs result in an older worker being considered for a potential early retirement and replaced by a younger worker without acquired rights. Yet this practice is increasingly criticized in social, political and economic spheres, because it converts experienced employees into inactive persons, and it promotes job abandonment by workers who, in many cases, are actually in better conditions (physically, mentally and in terms of experience) than younger workers.

However, demographic evolution (which shows a tendency to invert the age pyramid) and changes such as the increase in the legal age of retirement or the suppression of fiscal and Social Security incentives that encourage workers to accept voluntary cessation of activity, will have repercussions on the active population, increasing the proportion of older workers in the companies and decreasing that of younger workers.

So it is very important for companies to assess the impact that these tendencies might have on productivity and the retention of older workers and programs aimed at ensuring active and healthy ageing at the workplace should certainly be implemented.

The ageing process is influenced by various combined factors. The environment is one of them. A work environment that is safe and healthy at the physical, mental, social and organizational levels, that promotes and protects workers' health, that heightens their competences and empowers them as individuals, that reinforces their commitment to the company and is conducive to a positive attitude towards staying in the job, will lead to better performance and productivity and job retention in older workers, who will enjoy better health, quality of life and satisfaction on the job.

In this regard, one very worthwhile task is to design job adaption strategies that can be applied as workers grow older. These strategies must seek to create work environments that are favorable for older workers. Here are a few examples:

* measures that support physical and physiological health, so as to guarantee better performance and reduce absenteeism.
* initiatives that adapt the physical conditions or functions of each job to the needs of the workers, in accordance with their age.
* actions that facilitate the adaptation of learning processes to the needs of these workers, thus avoiding the obsolescence of their skills and motivating them towards greater personal and professional development.
* measures that facilitate the transition to retirement by means of different forms of flexible work.
* initiatives aimed at preparing retirement (financial planning, health, leisure activities, etc.).
* actions that favor inclusivity, based on increasing awareness and acknowledging the value that older workers bring to the company.
* actions that facilitate non-conflictive generational replacement within the company.

## A possible solution: making active ageing part of the management of health and safety at the workplace.

Companies usually have regulations regarding the management of health and safety at work, the purpose of which is to promote and maintain the highest possible degree of **health and safety at the workplace**. According to the International Labor Organization (ILO) the question of **safety and health at the workplace** refers to the social, mental and physical well-being of the workers, and thus encompasses the individual as a whole. This tool, which is designed within the company's work relations framework but generally does not address the progressive ageing of workers, can be used as the foundations for specific measures with which to promote active ageing.

## Questions to consider

1. Does your organization's activity to promote workplace health include aspects related specifically to the ageing of workers?
2. Does your organization's ongoing training activity promote workplace health throughout the workers' careers?
3. Are there any special mechanisms and measures aimed at adapting the job or the tasks to be performed to older workers' capacities (including those related to health)?
4. Are your organization's actions to promote workplace health based on regular and timely analysis of the data available about workers' health, especially in older workers?

**An example of best practice (United Kingdom)**

From June 2014, all employees in the UK 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.” 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. The individual’s reasons for wishing to work flexibly might be well founded or relatively trivial – it makes no difference to their right for their request to be considered.

The HR professional body, the CIPD is currently leading a UK Government task force to promote wider understanding of inclusive flexible work. The Advisory, Conciliation and Arbitration Service, an independent advisory and conciliation body ACAS, has issued some [guidance to employers on handling requests for flexible working](http://www.acas.org.uk/index.aspx?articleid=1616).

However, there is no such thing as a best practice model that can be copied "as is" to different contexts. Each company must define its own measures for adapting jobs based on the demographic data, interests and needs of its employees.

## 3.5. Rampant ageism and stereotyping against older workers [Barrier]

Ageism or discrimination on the grounds of age is a rampant phenomenon nowadays. Ageism is conditioned by the cultural approach and by the assumptions and stereotypes about older workers and their role in the wider society.

Directive 2000/78/EC, establishing a general framework for equal treatment in employment and occupation considers age as a cause of discrimination. However, it contains also an exception to this rule and allows Member States to provide differences of treatment on the grounds of age within the context of national law. If there is an objective justification, these differences will not constitute discrimination.

The first of the assumptions about older workers consists in considering that the main instrument to encourage youth employment is to introduce a mechanism that facilitates the exit from the labour market of older workers. The extension of the working life for older workers is considered a barrier to youth employment. So, early retirement is considered as one of the solutions for young unemployment. It is assumed that recent pension reforms that increased the requirements to access to early retirement have reduced the possibilities to hire young workers.

The second one is related to the health status of older workers. Statistics show that older workers are more likely to be absent from work and to suffer from long-term health conditions. Employers consider that this is an important problem that implies costs derivate from the substitution of older workers and affects company’s productivity. Older workers propensity to absenteeism is often seen as a problem from young colleagues as they are requested to substitute the former, to increase their workload, or to adjust their tasks and shifts accordingly. This is one of the reasons that explain the existence of conflicts between generations.

The third one is related to the labour cost as wages are usually based on seniority and not on competences so, generally, and old age implies also a higher salary. Young workers consider that this have a negative impact on their salary and career opportunities as they will always receive less compensation. Generally, older workers have higher pensions in comparison to future pensions of new generations of workers and they usually have open-ended full-time employment contracts while young people are generally hired with non-standard employment contracts. For that reason, young workers consider that they are in a more precarious condition than older workers. All these stereotypes contribute to the development of intergenerational conflict.

Fourth, it is assumed that older workers are not interested in participating in vocational training activities related to life-long learning and that they do not want to keep active at the workplace. Sometimes, it is also presumed that older workers are not able to adapt to the new way of work imposed by the digitalization of the labour market and that they are not as productive and creative as young people.

Moreover, in the context of performance evaluation the evaluators are generally older than the workers assessed. Younger workers feel they are penalising for that as older workers are not able to correct assess their value and needs that may differ from those of older workers.

## A possible solution: active ageing as an opportunity to overcome stereotyping against older workers

Work could represent an opportunity to overcome the stereotype according to which older people are seen as a burden for the society. Considering that retirement is not the end of active life, work would certainly help older people’s psychological well-being. Keeping a large part of the population active in social, political and cultural participation would have good implications for wider society.

It should be necessary to eliminate the culture that surrounds older workers in the transition to early retirement in order to promote the intergenerational exchange. It is not always true that the retirement of older workers will create new jobs for young people as usually young workers would not able to take automatically the vacancies of older workers.

Active policies at work aiming at promoting an adequate permanence of older workers in their job position should be promoted but this requires a change in the cultural approach to active ageing and about the role of older workers in the wide society.

One of the solutions to eliminate stereotypes and reticence regarding active ageing is to promote a culture that appreciate the skills of older workers by developing activities based on knowledge transference as mentoring. Active ageing can be identified as a process in which older workers transfer their know-how to younger workers. Knowledge should be transferred in a strategic and structured way thanks to which transition to retirement is not traumatic for older workers and neither the entry of young workers in the company. This allows a dynamic and supportive management of working relationships. Knowledge transference instruments consent the employer to take advantage of the investment that has made on a worker that has been working in a company for a long time. As the employer has done an investment on that person, he should be interested in extending the duration of the employment relationship.

## Questions to consider

1. Which is the role of older workers in your organization?
2. Do you consider that stereotypes presented about older workers are true?
3. Do you consider intergenerational conflict as a problem in your organization?
4. In your opinion, does active ageing can be considered as a solution to overcome stereotypes about older workers?

## 3.6. Conflictual climate of industrial relations [Barrier]

For employers, an ageing workforce should remain productive and efficient (efficiency); for trade unions, firms should create the conditions under which older workers can actively contribute to create value by filling their skills gap and responding to their growing healthcare and working-life-balance needs (equity). This requires a positive attitude and the active participation of both employers and workers that should be based on mutual adaptation in order to reconcile their respective needs. Labour-management and cross-workers solidarity and participation is therefore a central concept associated with sustainability in mitigating the effects of an ageing workplace (voice).

As a result, cooperation and integrative bargaining emerges as an enabling factor to shape active ageing through industrial relations and social partnerships at national or local level. Conversely, whereas the distributive approach to labour relations and collective bargaining prevails over the integrative one and effects on sustainability are more likely to be negative or controversial. Voice, in this respect, is expressed in terms of conflict: labour relations are polarised rather than balanced between efficiency and equity.

Yet confrontational industrial relations, which reflect more power-based rather than trust-based employment relationships, still prevail in Italy, and it results in less integrative bargaining outcomes. Efficiency pressures on the employers’ side tend to exacerbate this conflictual attitude: in most cases, labour relations at the shop floor are polarised rather than balanced between efficiency and equity, and this hamper sustainable management of an ageing workforce. In contexts where the climate of industrial relations is confrontational, efficiency pressures tend to prevail over sustainability, and the life course perspective in shaping employment policies remains unpractised. It comes with no surprise that national or sector-wide regulations based on a sustainable compromise between efficiency and equity do not necessarily translate into sustainable HRM or industrial relations practices at a firm-level, or that high and low roads to productivity coexist across sectors and companies.

## 3.7. Identified Barrier: Older workers’ outdated skills and resistance to retraining.

In most workplaces, having good skills is crucial to not only career progression, but even staying in work. As technology advances and the labour market changes, the pressure grows on older workers to keep skills up to date through training, on the job learning, mentoring and job rotation. Although older workers can benefit from training, they are less likely to take part than younger colleagues. This can put them at a significant disadvantage when seeking a job change or promotion.

What does the data say about older workers and training? According to the Labour Force Survey, 23% of people over 50 took part in some job-related training over the past three months, compared with 31% of employees under 30 and 27% of middle-aged workers. There are three reasons which can explain the difference.

First, employers are generally less likely to offer training to older workers than younger ones. Decisions to focus training resources on younger people is rarely described in ageist terms, but may be framed as a way to support ‘future generations’ of workers. Employers sometimes assume that investing in older workers’ training is not as good an investment as providing training for younger staff. However, this may not necessarily be the case. Older workers, on average, stay in their jobs longer than younger ones, so employers have a longer period of time to see a return on the initial cost of training older staff. Further, many older workers are looking for training which builds on rather than replaces their existing skills sets. In many cases, refresher training can pay dividends in terms of improving the productivity of experienced staff.

Second, older workers may not have the accreditation to take on new roles which bring opportunities to train. Older workers are less likely to have formal qualifications than younger ones which might hold them back in terms of taking training and career development generally. Access to higher education has increased over the past half century. Today, XX% of 25 year olds have at least an undergraduate degree, as opposed to XX% of people over 50. While the increased access to higher education is a good thing, rising standards for qualification mean that some older workers may feel passed over for new career and learning opportunities in favour of younger colleagues. Skills attained through work experience can be difficult for employers to quantify and they may use qualifications as a proxy for being able to do a job or take on a new challenge.

Finally, older workers themselves may be reluctant to ask for training, especially if they expect to be turned down by their employer. Asking for training can sometimes be interpreted as sending a signal to the employer that the employee is presently unable to carry out their work responsibilities. It’s not hard to imagine a manager asking an older employee, “Why do you need training on a job which you have been doing for the past two decades?” Of course, there are many reasons why: technology changes, the scope of the job may be different than it was twenty years ago, and/or everyone can benefit from refresher learning. Nevertheless, older workers may be reluctant to ask for training because they are afraid of having a skills need identified by their manager. This fear can be most acutely felt by older workers whose performance has been declining and are therefore at most risk of dismissal. Some training could help them improve their productivity but they don’t want to ask for it because they don’t want their manager to know that they have a skills need.

## A possible solution: Implementing an inclusive approach to learning

The key to making the most of training resources with employees of all ages is to have an inclusive approach to learning and development. Where all employees participate in appraisals and are given opportunities to learn, training is less likely to be perceived negatively. Further, employers which have strategies for a ‘talent pipeline’ so that employees can experience a range of jobs through their careers are more likely to have the flexibility to redeploy workers to where their skills are most needed. Social partnership can foster a culture of learning inclusivity in which managers see the value of supporting the skills development of employees of all ages and employees feel empowered to ask for training which can help them stay productive and employable.

Trade unions across Europe have taken initiatives to support a learning culture. One important initiative is the Unionlearn programme led by the UK Trades Union Congress. Union Learning Representatives (ULRs) are trained to provide advice and support to managers at the workplace level of the training needs of staff. They do so by talking with staff- both union and non-union people about their skills, career plans and training needs. They have tools available to help them discuss with workers where they see themselves both in the short-term (e.g. are you happy with your current job? Would you like to see a change your work routine) and longer term (e.g. where do you see yourself in five years?). They then support a learning environment in two ways: First, by guiding employees to support services which they can use to realise their short and long term career goals; and second by advising employers on the training needs and wants in the workforce. As such, ULRs play an important role in opening up conversations on workforce learning needs:

1. By giving employees a ‘safe space’ in which to talk about their own training needs.
2. By helping employers target their training to those who could benefit from it the most rather than simply those who ask for it.
3. By encouraging staff to think about their career goals, especially those who had been in post for a long time.
4. By fostering a talent pipeline environment in which training is a benefit rather than a punishment.

Social partners across Europe can learn from the Unionlearn programme. Tools which are used are available from the [TUC website](https://www.tuc.org.uk/).

## Questions to consider

1. Does your firm foster a learning positive environment?
2. Who usually asks for training in your workplace? Are opportunities taken up by most employees or only a small group?
3. Is training seen by staff as an opportunity or a punishment for poor performance?
4. (For union reps) How well do you understand the learning needs and career aspirations of employees in your workplace?
5. Can work be done in a social partnership way to facilitate dialogue with employees on learning needs?

## 3.8. Pensions and saving toward retirement [Facilitator]

Under saving toward retirement is a significant problem facing workers across Europe. People are overestimating their wealth as they leave work and underestimating how long they will live. Additionally, both state and occupational pension systems are changing as governments and employers seek to reduce the financial costs of ageing populations. Consequently, there is a significant pension gap across most parts of Europe.

Under saving varies across Europe. According to a studied carried out by Aviva and Deloittes (2016), the average Spanish worker should be saving about €7080 more a year in order to have a sufficient pension. Government has introduced a supplementary pension scheme to enable workers to top up their state pension, but there has been low take-up. The average British worker has a pension gap of almost twice that of their Spanish equivalent at €12,400. The UK government has sought to increase savings toward retirement through the introduction of a defined contribution (but non-redistributive) savings trust known as the Workplace Pension. However, autoenrollment only started being rolled out in 2012, so the current cohort of older workers will not see a benefit from the current scheme.

Some groups of workers are more affected by under savings than others. Women receive significantly lower pensions than men across Europe. In Poland, the average female pensioner receives a pension three-quarters the size of her male equivalent, while in Spain and Italy, it is two thirds. In the UK, women on average receive a pension 60% the size of that of men. There are many reasons for the gender pension gap (Bettio, Tinios, & Betti, 2013). First, it is a reflection of the gender *income* gap, especially in countries where pension entitlements are linked directly or indirectly to earnings. Second, many women in the current generation on the cusp of retirement had either forfeited or been denied access to occupational pensions when they left work in order raise families. In the UK, for example, up until the 1970’s female civil servants were required to resign their posts upon getting married and cash in their occupational pensions. They may have expected to be able to live off their husband’s pensions, but family turning points like a divorce can have a major impact on retirement plans. Third, women are much more likely than men to be pushed into retirement because of a caring responsibility. Consequently, many women leave work without planning for how they can finance their retirements.

Under saving also affects low income people more than those with high incomes, especially in countries like the UK in which occupational pensions and personal savings make up the majority of retirement savings. According to a recent study, a third of British pensioners only have the State pension to rely upon, with no additional sources of wealth or income (FCA, 2018). The British State pension is about 40% below the absolute poverty line and therefore cannot by itself provide for a sustainable retirement. A recently study found that low income older people are planning to address the problem of under saving toward retirement by retiring later. However, this may not be sustainable for people in physically demanding or stressful jobs.

**How can social dialogue help?**

The issue of pension entitlements is highly contested area of collective bargaining and social dialogue. Dialogue regarding what a fair retirement age should be, early retirement routes and pension rights for people who delay retirement beyond normal retirement age are certainly issues in which there is robust and often conflictual dialogue between social partners usually at the national and/or organisational levels. However, workplace level social partners can work together on issues where there is common ground:

1. Pre-retirement financial information and advice can play a constructive role in helping older workers plan for retirement. In a recent survey of British older workers, 43% of workers between the ages of 45 and 65 said they are only vaguely or not at all aware of what their finances will be once they retire. Pensions are highly complex and fluid. Understanding what one’s pension is can often be a huge challenge but essential for ensuring that when and how the transition out of work occurs. In the same survey, 59% said that they would like pre-retirement financial planning, but only 23% receive it (Davies, Van der Heijden, & Flynn, 2017).
2. Workplace level social partners can investigate jointly retirement plans of older workers. Finding out what help employees think would help them plan for sustainable retirements can help both unions and employers provide resources such as information, pre-retirement planning and financial advice from regulated advisors. Some social partners are surveying workers on the support for retirement planning covering topics like how older worker plan to finance their retirements, concerns which they have about the affordability of retirement, their level of understanding about their pensions and ways in which they may want to supplement their pensions like occasional or part-time work.
3. Supporting workers through individual pre-retirement advice can help employees make better choices over their retirement choices. Pre-retirement advice does not need to exclusively cover pensions and savings, but also what activities workers would like to be involved in in retirement, the timing of leaving work to ensure a sustainable retirement, ways to maintain social networks after retirement and preventing social isolation.
4. Some unions are using their retirement member associations to enable people in retirement to support those who are in work and planning their retirements. People who have retired can share their experiences and give advice to colleagues about making a successful transition out of work.
5. Ensuring that employees have clear pathways into retirement such as when to inform their employers about their retirement plans, discussions of retirement transitions and alternatives like phased retirement options.

**Questions to consider**

1. How aware of employees of their pensions and retirement savings? Are older workers are well prepared for retirement?
2. Do you have a sense of the kind of support which older workers can benefit from in terms of planning for retirement?
3. What resources are available to older workers as they plan their retirements?
4. Are there ways in which social partners can help connect workers with people who can advise them on a successful retirement like financial advisers, life planners, and people who have already transitioned to retirement?

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## 3.9. Intergenerational relay and knowledge transfer mechanisms (e.g., apprenticeships, mentoring) [Facilitator]

Initiatives of intergenerational relay date back to the ‘80s in Italy. These initiatives are based on the intergenerational replacement/distribution logic that believes facilitating the reduction of working hours or gradual retirement will generate new job opportunities for youths. These intergenerational company schemes are subsidized by public resources as compensation for some of the income loss of older workers. This same logic was followed by Decree n. 807/2012 of Labour Ministry21 that provided the possibility for the transformation of part-time to full-time employment contracts of older workers (50 years and over), and concomitant hiring of young workers (18-25 years old unemployed (up to 29 if a graduate) eligible for permanent work or apprenticeship).

Intergenerational relay mechanisms are the main negotiated channels for active ageing. Pursuant to such agreements, managers who are about to retire can convert their employment relationship into a part-time one and act as tutors for their newly employed younger colleagues or middle managers. However, this kind of agreements have not been very well implemented in the practice. In sectors where small companies prevail, the manager or the owner are the oldest persons in the production/service cycle, and they perform the same tasks of their younger employees: they are often involved in the same working teams together with young workers, and managerial activities tend to overlap with daily, ordinary working tasks. This facilitates knowledge and skill transfer, on the one hand, especially in family companies, where solidarity among the firm community is higher. On the other hand, this also results in informality in employee relations, and can bring for example the owner to underestimate the importance of formal training courses to improve his/her expertise or the one of his/her employees.

The implementation of knowledge transfer mechanisms, as apprenticeships or mentoring programmes, have been identified as a possible solution to overcome stereotypes and assumptions regarding older workers.

Sometimes, tutoring and mentoring programmes take place spontaneously within team of workers where older and younger workers cooperate even when an official programme of transference of knowledge has not been implemented in the company. Knowledge circulation is immanent in social relations in general. For that reason, a priority for companies is to create the environmental condition to promote spontaneous forms of cooperation within the workforce that promotes knowledge transfer.

However, as employee relations are not always based on cooperation, trust and solidarity as both older and young workers are often jealous of their skills, and unwilling to transfer them, structural programmes at company level should be implemented.

In this context, collective bargaining is fundamental to promote active ageing and the implementation of knowledge transfer mechanisms. Trade unions and employers representatives can add a value in building solidarity among workers. However, both companies and workers’ representatives are rather sceptical on this issue, as in some cases that kind of measures implicates an added cost for companies or a reduced net income for workers.

Mentoring and reverse mentoring stands out among the most used cross-generational programmes. Some collective agreements mention this kind of measures, although their source of regulation remains unilateral HRM.

Mentoring can be considered as an instrument to promote skills and knowledge transference from older workers to younger generations. This instrument is useful to keep older workers active and to promote knowledge transference in order to prevent company from losing the know-how that the older worker has obtained in long years once he is retired. Younger workers are supported by older workers in their transition from school to work and they are able to receive on the job training form a person that know better, not only, the job but also the companies’ context. From this point of view, active ageing is related to the productivity of the company.

However, there is also another perspective regarding knowledge transference mechanisms. Reverse mentoring is an initiative to promote the permanence of older workers in labour market in which the older worker is mentored or accompanied by a younger worker on topics such as technology, social media and current trends. Reverse mentoring is seen as an opportunity to promote a dialogue between generations and to allow older workers to become familiar with new technologies and other instruments that did not existed when they started to work. We can find an example of a reverse mentoring project in Italy, in Sanofi where there are not specific measures to older workers but they develop projects that address the entire working population, regardless of age or seniority in the role or in the company. From 2017 Sanofi is implementing a reverse mentoring project to allow talents (both senior and junior) to meet, exchange ideas, share the company’s culture strengthening skills.

Also, apprenticeship is considered as a good way to promote the transference of knowledge. Apprenticeships, which in Italy are regulated via collective bargaining, are good schemes to promote older workers mentoring and cooperation with young people. Although there a no formal provisions related to wage of the tutors enrolled in apprenticeship schemes, they generally have a longstanding experience in the qualification that the apprentice should acquire, thus the latter is generally younger than the former. The same goes for school-to-work transition schemes and any form of on-the-job training.

## Questions to consider

1. Do you know successful intergenerational relay mechanisms? Which do you think the main barriers for their implementation are?
2. There are knowledge transfer mechanisms in your organization? Do you know examples of that kind of mechanism?
3. Do you think that become a tutor for younger workers is the right way to keep older workers active in the labour market?

## 3.10. Planning retirement [Facilitator]

Many older workers are thinking about different ways to transition from work to retirement. While in the past, the timing of retirement was more or less uniform, today there is a wide variety of ways and at different ages. Many people are choosing to delay retirement by reducing their workload while extending their employment. They may do so because they want to try out new retirement activities but aren’t ready to fully leave work. Many others stay in work because they can’t afford to fully retire but they have responsibilities like grandparenting which they need to devote an increasing amount of time to.

Across Europe, governments are facilitating older workers to consider different ways to retire. In Spain, for example, full-time workers who have reached normal retirement age can reduce their working hours while partly drawing their pensions while in Italy, employees who reach retirement age can request a delay in drawing their pension and therefore extending their employment contract. Since 2010 in the UK, mandatory retirement ages have for the most part been made unlawful which means that for the most part, many older workers can stay in work for as long as they are capable of completing their tasks.

The fact that workers have more choices in how and when they retire is a good thing since they can tailor the timing of retirement to suit their lifestyles. It can also benefit employers since they can use phased retirement options as a way to retain older staff with key skills, manage workforce levels to meet labour demands, and encourage older staff to take on job roles which use their skills and experience in new ways. However, it also puts a new requirement on both workers and their managers to have full and frank conversations about the employee’s retirement in order to develop a plan which is workable for both sides.

Holding a conversation about retirement plans is not always easy. An employee may be reluctant to talk to their manager about when they want to retire since they want to avoid announcing that they are planning to eventually leave work and are therefore less committed to their job. Some may worry that announcing their retirement plans will result in them passed over for new assignments or exciting projects. They may therefore choose to wait until the last minute before letting their manager know that they intend to leave. Managers may also try to avoid conversations about retirement because they worry that broaching the subject would send the wrong signal that they want the older worker to retire as soon as possible even though that might be the opposite of the employer’s intent.

Having a conversation on retirement plans is crucial to managing the retirement transition in a way which suits both the employee and employer. First, employees may not always be aware of the choices which they have regarding how and when they retire. Even when an employer offers phased retirement options like reducing working hours or taking up a mentoring role, employees may not have considered these possibilities. Sometimes, mutually beneficial outcomes only come about through conversations between an employee and their manager. For example, a manager may want the older worker to delay retirement in order to support their successor in adapting to the job.

In order to have a full and frank conversation about retirement plans, older workers need information about not only what options are available to them, but also how they can achieve a fulfilling retirement. Pre-retirement planning can be a valuable resource for employees as they prepare themselves in terms of financial planning as well as mapping out what activities they want to do. It can also remove some of the uncertainty over retirement plans, as workers who have a clear idea of their retirement incomes are also more likely to have a firm date at which they plan to retire.

**How can social dialogue help?**

Retirement planning is primarily dialogue between the individual employee and their manager. However, social dialogue at the workplace or organisational level can encourage and support retirement discussions. First, union representatives and managers can work jointly to inform employees of the choices which are available to them. Social partners can discuss with employees not only what retirement options are available but also showcase examples of where staff have made use of phased retirement arrangements to make more successful transitions. Some unions are mobilising ‘retirement champions’: union members who had retired and are available to talk to colleagues about how to plan to transition out of work. Signposting where employees can gather information (such as pre-retirement course) is also important to support them in preparing for a retirement discussion.

Second, social partners can collaborate to find out how and when employees want to retire. Employees may be more comfortable talking to their union representatives than their manager about retirement timing since they can talk about their expectations and interests on a ‘no strings’ basis. Union reps can then brief managers about the kind of retirement offerings would most suit the workforce’s needs and aspirations. Finally, social partners can work collaboratively to ensure conversations on retirement plans are carried out in a constructive way. Such efforts can include:

* Agreeing a process for retirement discussions such that employees can start a dialogue about their retirement plans without prejudicing their career plans
* Setting a timetable for employees and managers to start and continue a conversation on retirement plans.
* Mapping retirement options which are available in the organisation and how they can be tailored to employees’ needs.
* Developing, trialling and embedding new approaches to retirement plans. Employees who try new retirement plans can feedback how they work and ways to adapt them for future staff.
* Identifying blockages to dialogue. If staff are unwilling or feel unable to talk about their retirement plans, union representatives can help find out why and discuss with managers ways to create safer spaces for staff to talk about their plans.
* Supporting individual conversations about retirement plans. In some circumstances, union representatives can be part of an individual conversation on retirement plans in order to advocate in support of the employee while offering ideas of mutually beneficial retirement outcomes.

It is important to remember that a discussion on retirement is part of an overall discussion about career development. Managers have regular conversations with staff about their career plans are more likely to have constructive discussions with staff about their retirement plans. This is because workplaces which have a culture of open dialogue on career plans are more likely to support discussions on retirement.

**Questions to consider**

* When and how do employees normally retire? Do they follow a set pattern or do they individualise their plans?
* Are there clear processes for discussions on retirement? Are employees and managers aware of when notice needs to be served and the timing for discussions?
* Do employees have a menu of retirement options which are available to them?
* Do employees and managers feel comfortable talking about retirement? If not, are there better ways to facilitate a dialogue?
* Is there a way to try and embed new approaches to retirement?

## 3.11. Flexible working in late careers [Facilitator]

Flexible working is becoming an increasingly popular amongst older workers. In the UK, 63% of people who are in work after the age of 65 are working on a non-standard basis which can be for example working less than a full-time basis or working only part of the year. Older workers may choose to work on flexible basis for a variety of reasons. For example, many older workers have caring responsibilities for grandchildren, elderly parents or even both (so-called sandwich carers). Others may want to reduce their working hours in advance of retirement so that they can phase out of full-time work.

**Flexible working** can also benefit employers. For example, many organisations use flexible working to make sure there they are sufficiently staffed during peak times, but not overstaffed when work demand is low. In the UK, all employees now have the right to request flexible working and employers need to give serious consideration to requests which are made. This does not mean that workers who request flexible working have the right to their first choice of working patterns. Normally, there is some discussion between the employee and manager to find a work pattern which suits the needs of both. However, most discussions which occur lead to a negotiated accommodation.

**Part-time working** is the most common form of flexible working amongst older workers. For many older workers, reducing working hours is a way to continue doing work which interests them while maintaining good work-life balance. However, part-time working might not suit everybody. Some older workers might need a change of work routine but not necessarily shorter hours. They might want to work part of the year for example so that they have time to travel. They may also be in work which is difficult to organise on a part-time basis like a management job. In addition to part-time working, many organisations offer other forms of flexible working, including:

* **Core working hours:** Allowing employees to adjust their working hours from week-to-week in order to suit their needs. Employees may be required to work during peak demand times (core working hours) but have flexibility outside of them.
* **Annualised hours:** Under this arrangement, employees have a total number of hours over a year with flexibility to adjust their working hours from week to week.
* **Snowbird leave:** Employees are employed on part-year contracts. For example, if an employee spends their winter in warmer climates, the employer may hold their job open for when they return home. Retailers often maintain these arrangements in order to retain seasonal staff (e.g. retired employees and university students)
* **Job sharing:** Two employees sharing a full-time role. Job sharing is a particularly effective way to enable staff who cannot work on a full-time basis to have access to work which cannot easily be carried out on a part-time basis. Employees who share a role normally develop a plan to divide work responsibilities and processes for handing over work between shifts.
* **Compressed hours:** Working the same number of hours, but fewer days a week
* **Staggered hours:** Changing work hours from week to week.
* **Portfolio working:** The worker works for more than one employer. This can be on a freelance basis, although not always so.
* **Locum work arrangements:** Especially used in the health sector, these arrangements bring retired health care professionals back to work on call to fill in for temporary vacancies.

**How can social dialogue help?**

Although flexible working is increasingly popular amongst older workers, many employers still consider such arrangements as suited only for people with childcare responsibilities. Although most requests for flexible working lead to an accommodation, older workers may be reluctant to ask for flexible working if they expect that they will be turned down. Social dialogue can help both in widening the availability of flexibility and ensuring that it is carried out in a way which is mindful of employees’ health and well-being. Ways in which social dialogue can help include:

* **Publicising the availability of flexible work arrangements**: Older employees might not always be aware of what options are open to them. If they are aware of the choices available and have examples of where they have worked in their organisations, it may be easier to envision how flexible working can work for them.
* **Trying new approaches to flexible working:** Managers are usually more open to considering flexible working when they can see that it has worked previously. Job sharing, for example, is difficult to envision especially in jobs which has a large amount of responsibility. Once a system is in place for managing workload, completing tasks and handing over duties for one job, it can be more easily replicated for others. Social partners can collaborate to pilot flexible work arrangements with different groups of workers, monitor the results and develop protocols for extending them more widely.
* **Promoting flexible working as a way to promote intergenerational solidarity:** Older and younger employees can work together on a job share basis such that the older worker phases out of a job in advance of retirement while mentoring the younger worker into the role.
* **Carrying out health and safety monitoring:** Although flexible working can be beneficial to older workers, working hour arrangements need to be set in a way which protects the health and well-being of staff. For example, compressed working hours can seem attractive to employees who like the idea of a three-day weekend. However, if long working hours lead to physical or mental stress, the arrangements are not sustainable.
* **Monitoring the well-being of older employees on flexible working:** Similarly, many flexible work arrangements, while seeming to give the older worker more choice in work can in fact lead to greater precariousness. Portfolio working, for example, may not be sustainable for a worker who has skills which have become out of date over time. Social partners can collaborate to ensure that older employees who are working on a flexible basis have access to training in order to keep their skills up to date.

**Questions to consider**

* What flexible arrangements are available in your organisation? Are there arrangements which could potentially be used but are not now?
* Are older employees aware that they can ask for flexible working?
* Are managers open to consider requests from older workers?
* Are some jobs considered ‘unsuitable’ for flexible working? Is that designation justified or is it that flexible working hasn’t been tried?

**UNIT 4. Good practices**

## 4.1. Mid-career job transitions [HR Policy]

Workplace active ageing is not just about extending working life but more importantly ensuring that as people age, they have access to work which is secure, sustainable and meets their needs in terms of balancing work with responsibilities and activities outside the workplace. Many older workers are happy working in the job which they have been doing for a long time and would like to continue on their existing career paths until retirement. For them, support in terms of training to keep their skills current, adjustments to working hours and health interventions can help them remain in work up to retirement age.

Other older workers may be looking for a career change after the age of fifty. They may be looking for a new challenge or want to pursue an interest which they have held for a long time. At the same time, many older workers are pursuing a job change out of necessity rather than choice. They may be in a job which were able to carry out when they were younger but has become too physically demanding or stressful as they age. They may also be at risk of being displaced in work through redundancy and need support in finding work which does not represent a significant drop in income or skills level.

Older workers make fewer job changes than younger ones. This may be because as people progress through their careers, they find work which suits them, makes good use of their skills and sparks their interests. However, many older workers who have an interest in a job change are reluctant to do so for a variety of reasons. First, older workers may be reluctant to enter the job market because they are unsure that they will be able to secure work which equivalent to what they do now. Older jobless people are out of work longer than younger ones. In the UK, almost half of all unemployed people have been out of work for over a year. Many end up in work which is far below their skills level or eventually count themselves as retired in order to avoid the stigma of being long-term unemployed.

Second, many older workers, while looking for a career change, may nevertheless want a job which can make some use of the skills, knowledge and experience which they have built up over their careers. They are not looking to start over in their careers but to take a new direction. This may require some training to enable them to transition to a new job. Finally, older job seekers often experience ageism and other forms of discrimination when seeking work and this can act as a deterrent to pursuing a new career. Employers rarely explicitly say they prefer young job applicants over older ones but may be reluctant to hire someone who acquired the qualifications a long time ago. While work experience is valued by employers, they tend to prefer experience in the same job or industry. Older workers seeking a new career may find themselves at a disadvantage when competing against either young job applicants or those with sector-based experience.

**How can social dialogue help?**

Older jobseekers find moving from one career to another because they usually lack support in making a successful job transition. It is often difficult for employers to see the ‘business case’ for supporting an employee into a new line of work if there is not an immediate benefit to the organisation. Older workers may also avoid talking about making a career change for fear of appearing less committed to their present job. However, a successful job transition can benefit to both the worker and their employer if managed well. Older job changers can help their former employers in building business partnerships with new organisations. Many also return to their old workplaces when demand for their skills peak and are willing to help out because they feel valued and supported by their former employers.

Some unions actively support members in exploring new careers. When the British unions representing steelworkers and clothes manufacturers merged in 2004, the new union was named the Community Union in part to reflect the support which the union provides members in the form of retraining to help them transition away from declining industries. In the UK, a pilot programme known as the Mid-Life Career Review was developed to support job changers aged 45-64 in making a successful career transition. Reviews were delivered by seventeen national partners including the Trades Union Congress affiliated Unionlearn programme. The programme offered counselling and support on employment, training, finance and managing health. Although mainly focussed on people who were either out of work or at risk of losing their jobs, it was also extended to older people who were looking for a change in direction of their work. The reviews led to one in three feeling motivated to find work and half learning about new career opportunities.

Why was unions’ involvement important to the programme? First, people who undertook reviews needed to be able to talk to advisors who were outside of their immediate workplaces so that they could talk fully and frankly about their aspirations without prejudicing their existing jobs. Second, union representatives were able provide guidance to participants on where to find help in making a successful transition. Third, union representatives were able to feed back to employers, government and other stakeholders the support which older job changers generally need as well as the barriers to successful job changes.

**Questions to consider**

* Do older workers in your workplace have opportunities to adjust their work in your organisation? How much scope is there for taking a ‘new direction’ in one’s career?
* What are the career aspirations of older employees? Do managers and union representatives discuss with older workers ‘where they see themselves in five years time’?
* Is there a business case for supporting older employees in taking a new direction? Can employees who are supported in pursuing a new interest be mobilised to support their existing organisation?

## 4.2. Good practice: Involvement of retired union members in consultancy, mentoring and counselling activities in favour of younger activists and workers [HR Policy]

In many countries, trade union membership does not need to end once the worker retires. Retired people can continue to be part of the trade union movement through associate membership in their unions. Many unions offer retired people the chance to continue their union membership after they leave work on a reduced rate. Older workers and retired employees represent a significant share of trade unions membership in Italy. In the UK, the share of members who are retired is small (about 5%) but still represents a significant part of the activist base. There are a variety of reasons why unions organise retired people:

* It is an important way to advocate for pension rights, especially for retired people who depend on the state pension for their retirement. In the UK, for example, the National Pensioners Convention has played an important role in protecting the “triple lock” which guarantees that the state pension will rise by inflation, growth or 2.5% per annum, whichever is highest.
* It gives voice to a group of workers who might be otherwise excluded from dialogue on public policy and workforce issues. Many unions have retired members’ groups which are able to offer policy advice on issues affecting retired people. Some unions also allow retired member groups to put forward conference motions to advocate for policies important to their constituents
* It gives retired people a way to stay connected to people in their workplaces. In a survey of retired union members, 81% said that the main reason which they have continued their union membership was because it keeps them in touch with their former colleagues (Flynn & Croucher, 2006). Some workplaces have retired members’ groups so that they can meet periodically and even return to work on an occasional basis.
* It gives unions a voice on community issues affecting older people such as local transport or neighbourhood safety. Retired activists can be ambassadors for unions in giving the union representation on local policy making boards.
* It provides an activist base which can be mobilised to work on important workplace issues. Many retired union members have experience as activists or elected representatives. Like organisations which rely on their retired employees to provide skills when needed from time to time, unions can mobilise their retired members to support campaigns. For example, UNISON relies retired members to support campaigns like the Ethical Care Charter which encourages local authorities to set at least a minimum workplace standards for social care which is commissioned.
* It may provide a framework for involving other people who are out of work like people who are unemployed or economically inactive for health reasons.

**Retired members and workplace active ageing**

Retired workers tend to remain unionized as trade unions offer them services and welfare measures. On the other hand, older union activists, especially those that used to work in executive roles in trade unions structures, are involved as trainers in training programmes for unions officials or in other activities such as campaigning and policy making. In some sectors like construction, retired people have been involved in apprenticeship programmes, helping to support young people in their learning on a formal or informal basis. In the UK care sector, some retired members are also ‘care ambassadors’ who promote working in the industry while also advocating for better training and career paths to support those who are in work.

The involvement of retired union members in consultancy, mentoring and counselling activities in favour of younger activists and workers is reported as a good practice, despite not widespread yet. A trade unions’ representative observed that the involvement of retired workers in these processes is important for three reasons: first, to “activate” them and to promote their inclusion; second, to make union consultancy services available for workers beyond working time; third, to promote knowledge transfer among trade unions’ members.

**Questions to consider**

1. Do retired people have a way to maintain their work networks via their unions? Does union membership offer a way to stay connected?
2. Do retired members have a voice on workforce issues? Can the perspective of people out of work be drawn through retired member committees so that active ageing measures are developed in a more holistic way?
3. Are retired activists’ skills and experiences able to be mobilised to address issues both in work and the broader community?
4. Can retired member groups act as a bridge between working and retired people on important issues facing both groups?

Flynn, M., & Croucher, R. (2006). Retired members in a British union. *"Work, Employment and Society", 20*(3), 593-603.

## 4.3. National level initiative [Facilitation of social dialogue]

Solidarity is one of the most well-known trade unions recognised outside of Poland. In the years preceding the socio-economic transformation, i.e. before 1989, an enormous social movement – Solidarity – played a significant role in the transformation of the political system. Currently, Solidarity participates in formalised social dialogue as one of the three representative trade union organisations.

In April 2018,[[1]](#footnote-1) the National Solidarity Commission organised a seminar entitled Managing diversity in the context of age. Challenges and expectations of the Social Dialogue parties [Zarządzanie różnorodnością w aspekcie wieku. Wyzwania i oczekiwania stron Dialogu Społecznego]. It took place in Warsaw-Falenty. The meeting was held under the leadership of EZA (The European Centre for Workers' Questions). Solidarity is affiliated to EZA alongside 70 other organisations from 29 European countries.

The issues related to the labour market in the context of the European Union’s ageing society were discussed in the above-mentioned seminar. The participants included the representatives of the trade union Solidarity, representatives of other trade unions, representatives of Polish employers, representatives of the academic milieu and policy makers. Furthermore, both presentations and panel discussions were enriched by sharing the related experience of trade unionists from other countries.

Throughout the discussion, it was emphasised that age management is no longer a choice but a necessity. It results from the changes taking place over the last decades in European societies and, as a consequence, leads to the development of versatile and diverse generations shaping today's labour market. It was further emphasised that in the face of these changes, the growing awareness of the need for intergenerational management gained much greater significance among the social partners.

The discussion referred to the European Autonomous Agreement on Active Ageing and Intergenerational Approach signed in March 2017. It has been pointed out that it can be a kind of a route map for social partners. The participants of the seminar recommended: translation of the agreement into the national languages of the EU countries with particular attention to the quality of the translation; dissemination of the agreement among union members and employers; creating a platform for age management at the European level with the use of cooperation at the local level.

## Questions to consider

1. Are such initiatives helpful in social dialogue?
2. What conditions should be met to make such initiatives happen?
3. Does your organization have its own and proven methods of disseminating knowledge on topics important from the social dialogue point of view?
4. Are these the printed publications or newsletters sent to individual company organizations?
5. What kind of stakeholders does your organization invite to cooperate with?
6. Are active ageing issues promoted at seminars, workshops and conferences?
7. What else can be done to share the experiences and practices?

## 4.4. Intergenerational Solidarity Pacts [Facilitation of social dialogue]

Collective bargaining plays an important role in regulating Intergenerational Solidarity Pacts, which have been signed in several sectors. This scheme is also promoted by the legislator and, in some sectors, is supported by bilateral funds established by social partners at sectoral level.

In Italy, the main purpose of Intergenerational Solidarity Pacts is to raise youth employment by facilitating early retirement of reduction of working time of older workers. However, they also promote the involvement of older people, by creating a link between different generations, in terms of skill transfer and creation of job opportunities. Pursuant to such agreements, workers who are about to retire can convert their employment relationship into a part-time one and act as tutors for their newly employed younger colleagues. However, these agreements necessitate to be implemented via firm-level bargaining or HRM programmes, and few (big) companies in Italy have done so.

In chronological order, mention should be made of the renewal of the national collective agreement in the chemical industry which took place on 22 September 2012. A range of innovative elements have been laid down, particularly in relation to the Intergenerational Solidarity Pact, also known as *Progetto Ponte*[[2]](#footnote-2). This project has been included in Chapter III on employability and draws on “the willingness of the employers to recruit and invest in young people, provided that older workers who approach retirement accede to convert their full-time employment contract into a part-time one”. The main purpose is that of raising youth employment, and concurrently, promoting the involvement of older people by creating a link between different generations, with the wealth of skills to be transferred from older to younger workers. For the project to be implemented effectively, the legislator has been encouraged to make changes to relevant legislation, particularly to remove certain limitations in the use of “working-time account”. The section that discusses organizational flexibility is also of interest, for it empowers company-level collective bargaining to derogate from national collective agreements in order to favour the recruitment of young people which cannot be hired through apprenticeship – e.g. due to age limits (Art. 25).

Reference should also be made to the collective agreement in the transport sector, which was renewed on 3 December 2012. This new collective agreement puts forth that managers who are about to retire can convert their employment relationship into a part-time one and act as tutors for their younger colleagues or middle managers. This provision is intended to favour youth employment, and above all, generational renewal – through the mutual exchange of knowledge – especially if one considers new legislation on retirement, which allows for workers over 60 years old to stay on at work.

In a similar vein, the collective agreement concluded on 5 December 2012 between Federmeccanica, Assistal, Fim-Cisl, and Uilm-Uil concerning the metalworking industry encourages the recourse to part-time work as a useful instrument for employee turnover and the transfer of skills. In this case, their practical implementation should be accompanied by a review of the relevant legal framework as well[[3]](#footnote-3).

On the same issue, the collective agreement conclusion on 22 January 2013 in the energy sector deserves a mention, for it represents an attempt on the part of social partners to review the organization of work in order to raise productivity and competitiveness in the global market. This is done in an acknowledgement of changes arising from the postponement of the retirement age that occur in the working life, though the actual impact is far from clear. Spending more time at work calls for alternative forms of employment which account for the new retirement criteria in order to promote the wealth of skills gained by older workers, who should be seen as a resource for society as a whole, and not only within the company. To this end, the previous agreement in the energy sector draws on the idea of “intergenerational exchange” discussed earlier, wherein young workers can be hired through apprenticeships, provided that their older peers convert their employment relationship into part-time work. As already pointed out, the effective implementation of this project hinges on the support of public entities, which should bear the social security contributions arising from the conversion of the employment contract, which would be paid by the workers otherwise. Regarding this point, in the sectors where they exist, bilateral bodies and funds are very useful as they can bear the social security contributions. Acknowledging this aspect, the social partners stressed the need for an investigation on the age levels at a sectoral level – to be carried forward by experts in the field – in order to gain a better understanding of the solutions and the issues related to the longer working life and the increased average age of workers.

Intergenerational Solidarity Pacts are the main measure used by social partners to respond to workers ageing. Main Intergenerational Solidarity Pacts are focused in promoting early retirement as this is still the main channel to deal with an ageing workforce in Italy. However, in other countries the main objective of Intergenerational Solidarity Pacts is to increase the employment rate of elderly people.

Intergenerational Solidarity Pacts can create a tension with the high road to active ageing, which is continuous training and retraining to fill the technological skills gap: the two processes – i.e. early retirement and working time reduction on the one hand, and requalification on the other – are often seen as alternative and in fact they are so. In this case, the real challenge is to make selective choices that fit on the needs of the single worker.

## 4.5. Bilateral bodies and funds [Facilitation of social dialogue]

In some sectors, the Intergenerational Solidarity Pact is supported by bilateral funds established by social partners at sectoral level. Italian social partners affect active ageing through two channels: bilateral bodies and collective bargaining. These two sources are complementary and organised through the principle of subsidiarity. Sectoral bilateral bodies are the main result of cooperative industrial relations in Italy under which active ageing policies can be better understand, justified and managed.

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: 1) they consist of representatives from social partners who conclude collective agreements through which such bodies are governed; 2) provide (employment) services and protection to both workers and employers in accordance to what is laid down by collective agreements and by statutory laws. Funds to such activities are collected by means of contributions paid by employers and – to a minor extent – by workers; 3) upon the free choice of the parties that comprise them, bilateral bodies are autonomous legal entities.

Beyond collective bargaining, bilateral bodies are also mentioned as a source of regulation and financing of active ageing policies. Training funds, integrative pension schemes and healthcare funds are positive examples of how social partners can create an ecosystem of resources and services to respond to an ageing workforce. However, these instruments are transversal: it is up to the single companies, their workers’ representatives and the workers to activate those instruments to deal with age-related problems.

The role played by bilateral bodies in terms of occupational health and safety is relevant, as they are legally assigned special functions and needed to provide special services. Legislative Decree No. 276/2003 and, more recently, the consolidating legislation on health and safety at work (Implementing Decree No. 81 of 9 April 2008, subsequently amended by Legislative Decree No. 106 of 3 August 2009), view the joint bodies as a channel to promote, steer, and support both employers and employees which should lean on a participatory model to develop strategies concerning health and safety. In practical terms, such legislative support is evident if one considers two funding schemes. Art. 52, sec. C provides for a special fund set up by the National Institution for Insurance against Accidents at Work (*INAIL*) that supports activities carried out by joint bodies. Further, Art. 51, par. 3-bis allows for the usage of ad-hoc funds (*fondi interprofessionali*), or funds for temporary agency workers in order to finance health and safety training programmes. Of relevance is also the fact that – pursuant to Legislative Decree No. 106/2009 – employers can be awarded with a certificate showing that effective OHS management practices and organizational models have been adopted. The fulfilment of these tasks on the part of bilateral bodies also ensures their involvement in terms of health and safety governance, on the assumption that such a participatory model contributes to building a safety culture in the company, increasing the minimum levels of protection in the working environment.

On the subject of **training**, that is considered as a common good and can help to promote employability and competitiveness, the Italian legislator has provided a significant number of provisions to allow bilateral bodies to carry out activities with regard to vocational training. The most important measure is the establishment of the 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 interconfederal agreements among the largest employers’ associations and trade unions at a national level. The direct involvement of bilateral and joint bodies in the provision of lifelong learning constitutes an attempt to experiment with and further develop supplementary welfare schemes to guarantee that workers are offered adequate protection, result of the relationship between active and passive labour market policies.

Bilateral bodies also provide a decisive contribution in terms of **income support measures**, by administering the mutual assistance of funds that support workers operating in those industries that do not envisage wage guarantee funds. Regarding active ageing, bilateral bodies guarantee income support for older workers that have accessed to early retirement, supplementing the resources offered by public welfare schemes, but also another measures. For example, in the 90’s the National sectoral collective agreement (NCLA) of the banking sector introduced a solidarity fund (*fondo di solidarietà*[[4]](#footnote-4)) entirely self-financed by the banks, formalized by a specific regulation of INPS, which finance the reduction of working time, professional training and early retirement of older workers. In 2012, the FOC[[5]](#footnote-5) was created (National Employment Fund). The objective of this fund is to promote the creation of new stable employment and to guarantee a reduction in costs for a predetermined period for companies that hire workers with an open-ended employment contract, in particular promoting intergenerational solidarity and fairness of the contribution to the Fund. A provision of the NCLA renewed in 2015 invites the managerial staff to contribute 4% of their fixed salary to the FOC.

Also in the energy, fashion and chemistry sector a bilateral fund of solidarity has been adopted (*Fondo TRIS*)[[6]](#footnote-6). The main objective is to manage business processes of innovation, intergenerational relay and active ageing, by using current legislative instruments to promote early retirement by guaranteeing income support and the payment of social security contributions. The fund also guarantees income support in case of reduction of working time.

In several sectors, social partners established so-called bilateral funds for integrative pensions and/or for integrative health assistance. All the workers, employed by a company that applies the national sectoral collective agreement that established the bilateral funds, are covered by an integrative pension fund/health assistance. The funds are financed through shared contributions from workers and companies. In some sectors, there are also specific integrative funds for managerial staff.

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. Therefore, sector health bilateral funds represent an important instrument to protect workers’ savings also because they can be extended to workers’ family. In several sectors, social partners established so-called bilateral funds for integrative health assistance[[7]](#footnote-7). Nonetheless, these actions are not negotiated within the active ageing policy framework. Their justification and articulation respond to other reasons (e.g. contrasting welfare state retrenchment, redistribution, increasing working time flexibility etc.), although indirectly they can be regarded as “active ageing measures”.

In a similar vein, bilateral bodies in many industries have set up pension funds to complement public pension schemes. There are the so-called *fondi di pensione[[8]](#footnote-8)*. All the workers, employed by a company that applies the NCLA that established the bilateral funds, are covered by an integrative pension fund/health assistance. The funds are financed through shared contributions from workers and companies. In some sectors, there are also specific Integrative funds for managerial staff.

Bilateral bodies can also provide placement services and this is among the most relevant functions assigned to bilateral bodies by law. The idea to authorize trade unions to serve as placement providers – also indirectly via bilateral bodies – arises from the assumption that they can protect workers not only by negotiating the best working conditions, but also by administering services that help the unemployed and first-time job-seekers access or re-enter the labour market.

## 4.6. Positive action committee on inclusion and diversity [Facilitation of social dialogue]

Metro Cash & Carry firm-level agreement, which was agreed by management and workers’ representatives of the Italian stores, establishes a so-called “positive action committee” which is tasked with proposing initiatives and solutions for promoting diversity and inclusion, also through a company project called ‘inclusion and diversity’, and monitoring the actions of the company’s active ageing project designed to support the activities and the potential of employees over the age of 55. Precisely, the positive action committee should promote training programmes to close the technological skills gap of older workers, as well as to design and implement mentoring and reverse mentoring programmes among the older and younger workforce. The agreement also states that, within the scope of the discipline regarding Sunday opening, workers who fall into any of the following categories are not obliged to work: mothers or fathers with children under the age of six; workers certified as carers for people with disabilities or people who are not self-sufficient; workers with disabilities. Most of the workforce that benefited from this provision are older workers. This was reported as a good example of how cooperative industrial relations can result in good measures to promote active ageing at company level.

**UNIT 5. Measuring progress**

## 5.1. Quality of Active Ageing in the Workplace: A Checklist

How do I know that active ageing is finding its way at my workplace? There is no validated tool to help you. However, we have put together a checklist including some key factors to be taken into account in the process of establishing an active ageing culture.

Read each statement and check () one of the 4 boxes to its right. Colour code follows that of a traffic light: the greener you are able to score the better.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Factors indicating good quality in active ageing in the workplace** | **Yes** | **More work required** | **No** | **Unsure** |
| **Health, safety and wellbeing issues:**  |
| Workplace health promotion |  |  |  |  |
| Occupational safety |  |  |  |  |
| Adaptation of workplaces to allow individuals to continue working (e.g., geographical, temporal, functional flexible working practices) |  |  |  |  |
| Provision for people with caring responsibilities |  |  |  |  |
| Maintaining high levels of motivation throughout the occupational career |  |  |  |  |
| **Age management and diversity strategies:** |
| Age and ageing awareness through a regular scanning of age composition of the workforce |  |  |  |  |
| Dignified employment exit and transition to retirement (e.g., flexible and phased retirement provisions) |  |  |  |  |
| **Continuing training and skills development to support longer careers:** |
| Relevant training for employees to remain competitive |  |  |  |  |
| Career planning and development |  |  |  |  |
| **Prevent and confront age discrimination:** |
| Age positive (non-discriminatory) recruitment measures |  |  |  |  |
| Actions dealing with age stereotypes and negative perceptions of workers |  |  |  |  |
| Ageing workforce is recognised in workforce planning |  |  |  |  |
| Building an inclusive and age-diverse culture |  |  |  |  |
| **Transfer of experience:** |
| Effective transmission of skills between older and younger workers (e.g., mentoring, coaching, joint learning/training) |  |  |  |  |
| Succession planning |  |  |  |  |
| **Subtotals** | x 2 | x 1 | x -1 |  |
|  |  |  |  |
| **You ‘Quality of Active Ageing’ score([[9]](#footnote-9)):** |  |

**UNIT 6. Pool of resources**

## 6.1. Making the case of Active Ageing in front of workers

The proportion of older workers in the European Union will increase in coming decades. As a consequence, the average age of European workers will soon be higher than ever before. What should we do about this? We need to define strategies by which to prolong the work life of employees, encouraging them to deepen their commitment to the company and have a positive attitude toward staying on the job. All of this can be done by improving their health, quality of life and on-the-job satisfaction.

This means that the workplace must become a major platform for promoting Active Ageing (AA). What advantages does the promotion of Active Ageing have for workers?

Measures that promote AA improve and strengthen older workers in several ways. First of all, the physical and cognitive conditions of the job are adapted to the needs of each employee, depending on his or her capacities. This brings older workers a greater sense of well-being, more positive attitudes at work and a higher degree of employability.

In addition, making AA a priority brings positive consequences to all workers, in terms of relationships between generations. Work is a **medium of social** **exchange** between people of different ages but it is also a space in which to bring together the skills of the younger workers and those of the older generations. This naturally heightens intergenerational learning, which can take the form of orientation, training and consulting among individuals.

Companies that support AA offer workers greater opportunities for learning and development as they grow older, especially as workers reach old age. Learning is ageless: what changes is the way that learning occurs. In settings that promote AA, older workers have easier access to training —for personal and professional development— and they also have equal opportunities to acquire new skills and update their professional competencies.

In conclusion, effective AA measures, in addition to prolonging the work life of employees and thus delaying retirement, also bring improvements in the health and capacity of older workers. They promote work environments that do not discriminate against older workers and they support life-long learning, adapting the learning processes to the needs of these workers.

We know that work settings that are positive and favorable to ageing persons can help avoid illness and physical/mental deterioration, enhance cognitive and physical capacities and generate positive and active attitudes toward life. The quality of our work life has a great impact on all of us, since most of us spend a lot of our time working. Recent longitudinal studies indicate that a person's work capacity prior to retirement is a good predictor of how independent that person will be in his or her daily life between the ages of 73 and 85. So, the greater the work capacity before retirement, the better quality of life a few years down the road. Clearly, making solid investments in the area of active ageing at work is of great importance. Investing in safety and health at work is an investment in the rest of our lives.

## 6.2. Making the case of Active Ageing in front of human resources managers

The primary aim of human resources management is to ensure that all of the company's employees collaborate actively in the organizational project. This is done by bringing about greater equity among employees, increasing the coherence of the decisions and actions that affect them, improving the quality of their work life and putting in place ethical and responsible practices, among other measures. All of this must also be applied to older workers, because obviously they too are part of human resources. The key question is whether the aforementioned measures should be implemented in the same way when dealing with older workers or if some special consideration must also be taken into account in the case of these workers.

Well, yes, there are some specific questions in the area of human resources management that must be considered when dealing with ageing employees.

For one thing, as a result of demographic changes, the average age of a company's workers is increasing rapidly. Also, young people are joining the job market later, due to longer periods of schooling and training (and also because of the difficulties of finding employment). In consequence, intermediate age groups (35-50 years of age) and older age groups (over 50) are taking on a primary role in companies.

Moreover, national and international institutions agree on the importance of implementing strategies that guarantee the quality of employees' work lives as they grow older, thus enabling them to stay at the company longer. All of this is known as promoting active ageing (AA) and it is becoming one of the main vectors of social and work policy in the EU, in response to the demographic ageing of society as a whole and of the job market in particular.

In addition to the prolongation of people's work lives and the delay in retirement that comes with it, the adoption of effective measures in the area of AA is justified by certain concepts related to health and work capacity. Promoting AA means creating work environments that are favorable to older workers and adapting learning processes to these workers' needs.

Implicit in all of this is the need not just to maintain but to care for the company's human resources, paying attention to their age and progressive ageing.

What is positive about having an ageing workforce? Older workers are valued for their vast experience and for their in-depth knowledge of the company and the job they do. They are also highly appreciated for their greater emotional maturity, their commitment to the company, their reliability, their contribution to the company's good reputation and their high degree of independence. They often inspire and serve as an example to younger workers.

If ageing, as demographic data indicate, is becoming a challenge to companies, it is also going to be necessary to stimulate intergenerational solidarity, by which the skills of the younger workers intermingle with the advantages typical of older workers. For example, more senior generations can nourish younger workers with their experience and the newcomers can teach older workers about new technology and applications. The idea is to foster intergenerational learning by creating different kinds of relationships, which may take the form of offering guidance, sharing skills or serving other individuals in an advisory capacity. Other approaches might include the creation of multigenerational work teams or the application of initial or continuous training methods that make the most of situations in which different generations get together and learn together. Intergenerational learning benefits companies in several ways: it helps keep basic skills and experiences inside the organization, it combines the strong points of the different generations and strengthens relationships within the company because it helps break down stereotypes and negative attitudes regarding age.

In short, ageing should be viewed not as a threat but as a challenge and an opportunity. It is an important issue that every company must address through its policies in human resources management, for reasons related to both competitiveness and social responsibility.

## 6.3. Checklist on health and safety for older workers

**Checklist #1 Measures for health promotion among employees**

Does your organisation conduct **activities** aimed at (for each of the following risk factors tick whether they can be found in your organisation or not):

|  |  |  |
| --- | --- | --- |
| **Activities** | **YES** | **NO** |
| Raising awareness about healthy eating? |  |  |
| Raising awareness of the prevention of addiction, e.g. to smoking, alcohol or other drugs? |  |  |
| Promotion of sports activities outside of working hours? |  |  |
| Promotion of spine strengthening exercises or stretching at work? |  |  |
| Promotion of other physical exercises at work? |  |  |

Source: based on examples from [www.hse.gov.uk](http://www.hse.gov.uk)

**Checklist #2 Measures for health promotion among employees**

Depending on the type of work, there are **different types of risks and hazards**. For each of the following risk factors tick whether they can be found in your organisation or not.

|  |  |  |
| --- | --- | --- |
| **Risk factors** | **YES** | **NO** |
| Tiring or painful posture, including sitting for long periods  |  |  |
| Lifting or moving people or heavy loads  |  |  |
| Loud noise |  |  |
| Repetitive hand or arm movements |  |  |
| Heat, cold or draught |  |  |
| Risk of accidents related to the use of machines or hand tools |  |  |
| Risk of accidents related to vehicles used at work but not on the way to and from work |  |  |
| Chemical or biological substances in the form of liquids, fumes or dust  |  |  |
| Increased risk of slips, trips and falls  |  |  |

Source: based on examples from [www.hse.gov.uk](http://www.hse.gov.uk)

**Checklist #3 Measures for health promotion among employees**

Depending on the type of work, there are **different types of risks and hazards**. For each of the health risks resulting from the **way work is organised, from social relations at work or from the economic situation** tickwhether they can be found in your organisation or not.

|  |  |  |
| --- | --- | --- |
| **Risk factors** | **YES** | **NO** |
| Time pressure |  |  |
| Poor communication or cooperation within the organisation |  |  |
| Employees’ lack of influence over their work pace or work processes |  |  |
| Job insecurity |  |  |
| Having to deal with difficult customers, patients, pupils, etc. |  |  |
| Long or irregular working hours |  |  |
| Discrimination due to gender |  |  |
| Discrimination due to age  |  |  |
| Discrimination due to ethnic origins |  |  |

Source: based on examples from [www.hse.gov.uk](http://www.hse.gov.uk)

## 6.4. Strengthening social dialogue on active ageing: basic tips

In coordinated market economies social dialogue and industrial relations institutions have the role to reconcile subordination and economic freedom with workers wellbeing and dignity. The industrial relations approach is perceived as the best way to reconcile sustainability with productivity in the field of active ageing. Social partners should use social dialogue to promote changes in legislation, by asking for a greater flexibility regarding some legislative measures that nowadays are an obstacle to active ageing, for example.

It is important to promote social dialogue on active ageing in a preventive way and in a long-term perspective. Discussing an issue when the problem has not materialized yet gives the possibility to find more sustainable solutions. As workers’ need and ability to work changes over time, the balance between the interests behind the employment relationship should not only be adjusted consequently, but it needs to be anticipated, adapted and re-regulated, in order to reduce distributive tensions within the workforce, and between workers and management, in a life course perspective.

Social partners should promote the coordination between active ageing measures presented in collective agreements and public policies. Public policies have great importance in the implementation of active ageing policies. Population aging is an issue that do not concern only social partners, but legislation is central because social partners do not have the possibility to implement comprehensive active ageing policies in collective agreements. A public system of welfare that promote active labour market policies, both regarding outplacement and vocational training, is necessary to guarantee the inclusion of older workers in the labour market.

In order to strength social dialogue on active ageing, social dialogue has to find alternatives to the idea of early retirement and intergenerational relay as these are not active ageing measures.

When trade unions have a collaborative and proactive approach to this topic and not a conflictual one and are keen to collaborate on active ageing policies, their support for the implementation of active ageing measures becomes fundamental as they better know the needs of the workforce. 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 useful way to manage ageing problems. Yet a favourable context for sustainable active ageing policies is where the integrative approach to social dialogue and industrial relations prevails. Cooperation implicates that agents involved in the regulatory process coordinate and collaborate to make coordination efforts effective. Effective active ageing policies might be framed as a mutual interest of both workers and firms, and they can cooperate to achieve such common goal. This proposition is consistent with the European Social Partners’ Autonomous Framework Agreement on Active Ageing and an Inter-Generational Approach, which is based on the idea that “ensuring active ageing and the intergenerational approach requires a shared commitment on the part of employers, workers and their representatives” (BusinessEurope, UEAPME, CEEP and the ETUC, 2017).

Social dialogue with territory and community is also key for a successful implementation of active ageing measures. When negotiating active ageing policies, social partners should consider the ecosystem in which the company operations are based, as well as the distance for the commuting. A good practice was reported regarding a company based in Nuoro. Once the public fund to support working time reduction to tackle the economic crisis finished, a group of workers aged around 55 became redundant. In order to avoid their collective dismissal, their company, trade unions and local institutions came up with the idea to reemploy the redundant workers in social utility activities related to the conservation and care of the urban commons and the community.

Social dialogue should focus on case-by-case strategy along with an approach to active ageing that takes into account the overall conditions of the workforce and the single worker, irrespective of their nominal age. For example, there is consensus that training and lifelong learning programmes are positive instruments for active ageing, provided that they are focused on the need of the single worker or groups of them. However, due to cost and efficiency pressures, training courses are often general and impersonal: companies tend to involve as many workers as possible in training course. For older workers the biggest challenge is to “learn to unlearn”. This means that it is much more difficult to train over 50 workers as they have 20-30 years of experience and change their behaviours is tough.

Social dialogue is also key in order to promote the management of active ageing policies through sectoral bilateral bodies and funds. However, these instruments are transversal: it is up to the single companies, their workers’ representatives and the workers to activate those instruments to deal with age-related problems.

It is important to increase awareness about the importance of active ageing among trade unions and employers in order to promote social dialogue on that topic and the introduction of ageing measures in collective agreements. Generally, the approach of employers to active ageing tends to strike a balance between sustainability and productivity of an ageing workforce. The policy rationale is 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. These aspects are seen as two sides of a same coin in principle and social dialogue is the best instrument to find the balance between older workers’ and employers’ interests. However, in some contexts is much more difficult to combine them because short-termism tends to prevail in HRM. Workers wellbeing, in general, is considered as a cost: the return in terms of productivity is not immediate. Active ageing, in contrast, necessitates investment and a long-term perspective: this is the high-road to productivity.

On the other hand, in some companies, active ageing is managed unilaterally by the company as an HRM policies without the participation of trade unions as they are not interested on the topic. In these cases, active ageing policies are implemented by the company decision as some firms look 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.

It is also important to promote social dialogue on active ageing at European level as the ageing of the population is an extended problem in Europe. In response to the challenges deriving from demographic change, the European social partners, BusinessEurope, UEAPME, CEEP and the ETUC (and the liaison committee EUROCADRES/ CEC), agreed in the context of their 2015-2017 Work Programme to negotiate an autonomous framework agreement on active ageing and an inter-generational approach. The framework agreement is based on the principle that ensuring active ageing and the inter- generational approach requires a shared commitment on the part of employers, workers and their representatives.

##  6.5. Need adapting older worker’s job? Basic tips

Workers’ capabilities change with age, both at physical, physiological and psychosocial level. Generally, older workers have a reduced workability and it is difficult for them to perform the previous tasks in the same conditions that when they were younger. In order to consent them to keep their job, or to find a new one, workplace and working conditions adaptations are necessary.

One of the most common adaptations of working conditions for older workers consists in working time reduction. The transformation of the full-time employment contract into part-time is one of the measures that in Italy are promoted both by law and by collective bargaining. According to law n. 208/2015, article 1, paragraph 284, private employees can transform a permanent full-time job into a part-time one if: they reach 66 years of age 7 months before 31/12/2018; they have at least 20 years of contributions; they reduce their working time by 40-60%. Working part-time can allow older workers to conciliate their job and their personal needs, for example, those related with their health status or with family, and to facilitate the transition to retirement. However, even if part-time could be considered as an active ageing measure, sometimes it is not the most convenient option from the economic point of view, both for the employer as money saving respect to full-time contract is not very high, both for the employee because salary is reduced and most of the times it is necessary to find another occupation. When older workers reduce working time also wages are reduced. This represents a problem if wage is the only workers’ income so it would be necessary to understand how to integrate the reduced wage.

Moreover, even if part-time could be considered as an active ageing measure, in those sectors where part-time is already the rule, particularly the tourism and the cleaning sector, it would be necessary to find other instruments to support older workers in the transition to retirement that do no represent an additional burden to the company.

Flexible working that may consist in changing shifts, smart working or telework are also important measures to allow older workers to keep working according to their needs. In order to consider smart working or telework as an efficient active ageing measure, it is needed to take into account the ecosystem in which the company operations are based, as well as the distance for the commuting. For example, if the company is based in a big city, and the worker lives by the company premises, he/she would probably prefer to go to the office, instead of staying at home. It is necessary to take into account that work from home could generate loneliness and exclusion, especially for older workers that are used to work from the office.

Also tasks’ adaptations are an important active ageing measure. Sometimes, the problem is not the age itself as nowadays the number of task that require extremely hard work is low. The problem is that as consequence of the digitalization, the way of work has changes and rhythms are faster and older workers could have more difficulties to follow these rhythms. In order to avoid that, employers need to offer training and retraining schemes to help older workers with upskilling and new technology. Another possibility is to reduce the workload of older workers.

Tasks’ or working time adaptations allow the retention of talented employees in areas where skills are scarce. In that companies where worker’s professionality has been developed along the years, early retirement of older workers represent an important problem in terms of labour productivity and for that reason, companies are interested in promoting active ageing measures.

In some sectors, like in the tourism sector workers do heavy and repetitive tasks and challenging schedules with shifts starting early in the morning. This typology of working conditions affects particularly older workers. In the retail sector, ageing problems affect older women that work as supermarket cashier. The dimensions of supermarket cash are being reduced and this represent a problem for workers with overweight problems, particularly, older women. The banking sector, in turn, is being particularly affected by digitalization that implies bank’s restructuration and a higher number of redundancies. A solution to allow older workers to keep their job consists in changing their tasks by creating a system of job protection. According to this system, older workers would be able to change their position in the organization in order to keep working. Older workers could perform roles that require less physical activity and more cognitive activity.

Also job-specific accommodations are key to promote active ageing. These adaptations are, for example, adaptation of workstation, ergonomic design of the equipment or other kind of supports. Thanks to new technologies the implementation of accommodations in working instruments that help older workers to perform their job is easier and cheaper. New technologies have allowed also the development of assistive technologies are any object or item that helps a person perform the job, e.g. computer software, organizers, recorders, and timers.

Adaptation of worker’s job is also important from the point of view of Occupational Health and Safety. The most common Personal Protective Equipment (PPE) are those unisex and standardized that do not take into account problems related to ageing and gender, particularly the specific needs of older women. Sometimes, ageing causes important changes in worker’s morphology, particularly regarding size. In some cases, these changes could lead to a higher exposure to work-related risks. For this reason, standard PPE and work wear are not adapted to older workers.

## 6.6. Good multigenerational teaming in the workplace. Some tips

“It is time for Human Resources and talent management professionals to stop looking at what divides us among the generations and start with what keeps us together‒our desire for our organizations to succeed, our need for good leaders, finding success in our careers, and recognizing that we all face aging and uncertainty in our future” (White, 2011, p. 6).

Diversity is an asset. There's no doubt about it. The question to ask is what degree of diversity and what kind of diversity is the best mix for each specific workplace environment. This question also applies when it comes to generational diversity. Not quite the same as age groups, generations are groups whose work trajectories have been affected in similar ways by historical or organizational events. To put it more clearly, it is one thing to look at how a group of 25-30 emergent adults understand work-life balance because of their age, but it is quite another to group those workers in a company with others workers whose lives have been affected by changes in the company’s structure after a takeover or by new legislation that delays retirement.

In general, when we talk about age groups and generations at the workplace we come to see that the passage of time in people’s lives and work trajectories most definitely shapes how these people approach and confront work . The organizational challenge is to make it possible for the values and assets of every age group and generation to be combined in a way that enhances job satisfaction and productivity throughout longer lives.

Colleagues at the Global Institute for Experienced Entrepreneurship argue that the ‘experienced economy’ seems to be the only natural resource that is growing. Are we aware of this growth? Also, a recent report by Sodexo has concluded that “today’s workforce spans five generations, and employers who promote intergenerational learning initiatives for their employees optimize the value of these five generations in their organization. Catalyzing intergenerational experience is a new source of competitive advantage that benefits all generations and organizations.”

How can we draw from current age and generational diversity at the workplace to develop stronger and more efficient teams while at the same time countering negative age and generational stereotypes and promoting an active ageing culture? This is the real challenge that lies ahead.

Through ASPIRE's research we have learned that attention must be paid to intergenerational issues at the workplace, such as (i) the tendency to undervalue the practical experience amassed by older workers in favor of the higher levels of education that younger workers often have; (ii) older workers’ vulnerability in the event of cost cutting measures, because of their higher salary compared to younger employees; (iii) the generational divide that can arise out of younger workers’ complaint that older workers are favored, because of their need to work with great dedication in the final stages of their career in order to qualify for a decent public pension; (iv) the pressure exerted by younger generations of workers on older ones, urging older employees to stop working and thus make room for younger ones.

What can be done about these and other challenges of this type? Some tips follow

* Do a scan of the barriers to intergenerational learning that might exist within your organization's teams (see Annex I).
* Determine the quality of your workplace’s intergenerational atmosphere using a valid scale (see Annex II).
* Introduce knowledge management systems by which older workers can pass on knowledge to younger workers.

Kaplan, Sánchez & Hoffman (2017) discuss a study performed in the U.S., the Older Mentors for Newer Workers intervention, on the life satisfaction of aging workers. The study sampled 22 culturally diverse workers, ages 55 to 75, who were employed full-time at a nonprofit community service organization. These workers were matched on a one-to-one basis with newer agency workers and were asked to mentor the latter ‒by listening and offering support‒ during a six-month period (Stevens-Roseman, 2009). This opportunity for generations to meet and relate to each other brought about increased life satisfaction for older workers and provided valuable support to newer agency workers.

* Bilateral bodies can be used to support intergenerational learning and restoration of employability. Older workers, especially those wanting to phase into retirement, can be redeployed to train younger workers, especially those who have been, or are at risk of becoming, unemployed. Such programs can be pathways to sustainable work for both generations. For older workers, training younger workers can be a way to reduce the level of physically demanding work, while for younger workers it can provide the chance to upskill and transition into permanent work.
* Consider the implementation of an Intergenerational Solidarity Pact, such as the following program set up in Italy:

*“An example of cross-generational solidarity is found in the national sectoral collective agreement (NCLA) of the [Italian] 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 to create fruitful and stable employment by supporting the permanent employment of young people), to demonstrate solidarity between generations.”*

* Provide opportunities for generations to meet, relate and co-operate. The UK coach operator National Express has recruited people for whom age and extended career breaks create an obstacle to finding employment, including the over-50s, women returning to work after raising children, the long-term unemployed and full-time care-givers. “We place a high value on a diverse workforce because it reflects our broad customer base and we believe our business is strengthened by a wide range of skills and experience,” said Tom Stables, managing director for the company’s UK coach division.” (Groom, 2016).
* Re-balance specific weaknesses of each generational group.
* Try to meet the expectations held by each generational group.
* Foster the intergenerational profile of the workforce. How to do it? The SILVER project (*Successful Intergenerational Learning through Validation, Education and Research*) drew up the following checklist of critical factors in the creation of an intergenerational workforce:

Recruitment

 Develop a strategy to hire both older and younger employees (in proportion to the desired age demographics of your workforce).

Health management

 Implement programs that promote good health, for example: ergonomics, exercise, diet, disability management, health checks, information and communication, etc.

Training

 Focus on creating a practical and work-oriented learning environment in which employees are encouraged to define their own learning objectives, in addition to the prescribed learning content for the group.

 Provide a variety of training options.

Consider different forms of job mobility and learning opportunities

 Explore options for job rotation, cross-training and lateral movement or the possibility of working on high-visibility projects. Provide choices in terms of team formation and expand the scope of participants' action and decision-making.

In case of an aging workforce and limited hiring possibilities

 Consider incentives for older employees to continue to improve their skills and knowledge (for example, with a reward program or wage increase for participation in training).

 Develop an environment in which new ideas to improve production or service provision are welcomed, examined and, when deemed especially useful, rewarded.

Work environment

 Provide an age-friendly workplace (work environment, working time and working structures) that is conducive to learning. Features of a learning-conducive workplace include:

 Adequate information on the aims and purpose of job tasks is provided

 Employees are encouraged to participate effectively in specifying the aims, planning and organization of the work

 Opportunities for own work’s control and improvement are offered

 Workers are asked to perform tasks that are variable and complex, yet also manageable

 Feedback on success and achievement is given

 There are opportunities for communication and cooperation

 There are opportunities for cognitive and emotional reflection (Spannring, 2008)

Retirement models

 Provide employee-oriented retirement models that allow employees to work longer but also have enough flexibility to accommodate employees who do not want to work, or are unable to work, at full capacity until retirement age.

Communication and change management

 Promote awareness among executive staff, management and employees as to how demographic changes will affect them personally and how to respond to social and organizational changes.

 Organize age management workshops or seminars for the executive staff with a focus on communicating information about ageing and work.

 Encourage employees to learn to assume more responsibility for themselves regarding financial matters, maintenance of their health and their skills.

 Leverage the benefits of social networking tools to build relationships, increase collaboration and enhance employee engagement. Examples include video conferencing, blogs, an internal company “facebook”, use of C-vision, podcasts, etc.

## Management of age and intergenerational relations (SPReW project)

The SPReW project (*Generational Approach to the Social Patterns of Relation to Work*), which involved partners from Belgium, France, Germany, Hungary, Italy, and Portugal, published a guide for practice that includes pathways and recommendations for better management of age and intergenerational relations in the area of work and correlated fields:

- age-diversity management: approaching different age-related attitudes and competencies as resources; facilitating mutual understanding among different age groups.

- practices of knowledge management: assessment, valorization and exchange of skills and experience regarding old and young workers and knowledge transmission in both directions.

- more recognition of experience of old workers, also involving them in mentoring projects.

- designing new training systems and career paths according to heterogeneous needs in different phases of the life cycle.

- enhance job satisfaction, especially addressing young people’s expectation of autonomy, the middle generation’s need for flexible working, the older generation’s need to avoid tasks that are too heavy and demanding.

## Types of intergenerational learning practices (SILVER project)

* **Intergenerational and reverse mentoring**, i.e. when an older worker mentors a younger one, and also the opposite: when the younger worker is the mentor.
* **Intergenerational teams**, or mixed-age teams, are explicitly created in order to gather a diversity of knowledge, skills, and experience.
* **Intergenerational knowledge capture**: a tested method used for codifying expert knowledge in such a way that it can be easily transferred and understood by others.
* **Intergenerational training and workshops** to stimulate learning among and between the generations.

## Questions to consider

1. Do you have a diverse generational profile in your workforce?
2. What are some of the barriers to intergenerational learning within your organization's teams?
3. What is the quality of your workplace’s intergenerational atmosphere?
4. Are you able to list any intergenerational practices already underway at your workplace?

Annex I. Scan of barriers for intergenerational learning within the teams of your organization (SILVER project)

This tool is meant to be used by managers, consultants or HR professionals. It answers the question, “are there any barriers for intergenerational learning within the teams of the organization?” The questionnaire should be filled in by all members of the target population.





Annex II. Work Intergenerational Atmosphere (WIA) (King, 2010)

The WIA scale includes the following five related subscales:

* Workplace Intergenerational Retention: lack of pressure employees might feel to leave their position because of their age.
* Positive Affect: positive feelings towards co-workers of all ages.
* Lack of Stereotypes: degree to which workers fail to make broad aged-based generalizations about co-workers.
* Workplace Generational Inclusiveness: feelings of a common group identity among different aged workers.
* Intergenerational Contact: amount of cooperative contact workers engage in with peers outside one’s generation.

**Workplace Intergenerational Atmosphere**

Please indicate your level of agreement with the following statements by checking either “Strongly

Disagree,” “Disagree,” “Agree,” or “Strongly Agree” for each statement.









1. 23-25.04.2018 [↑](#footnote-ref-1)
2. <http://www.bollettinoadapt.it/old/files/document/19096pezzo.boll.IPPO..pdf> [↑](#footnote-ref-2)
3. <http://www.federmeccanica.it/images/files/ccnl_2012.pdf> [↑](#footnote-ref-3)
4. [https://www.abi.it/Pagine/Lavoro/Relazioni-sindacali/Fondo-di-solidarietà.aspx](https://www.abi.it/Pagine/Lavoro/Relazioni-sindacali/Fondo-di-solidariet%C3%A0.aspx) [↑](#footnote-ref-4)
5. <https://www.abi.it/Pagine/Lavoro/Relazioni-sindacali/Fondo-Nazionale-occupazione.aspx> [↑](#footnote-ref-5)
6. <http://www.femcacisl.it/wp-content/uploads/2018/03/FondoTRIS.pdf> [↑](#footnote-ref-6)
7. For example, Fondo EST for trade and tourism sector <http://www.fondoest.it> [↑](#footnote-ref-7)
8. For example, Fondo Fon.Te. for trade and tourism sector <https://www.fondofonte.it> [↑](#footnote-ref-8)
9. Score will be the result to add up all three subtotals (Yes, More work required, No) once each has been multiplied by its weighting factor (2, 1, -1). [↑](#footnote-ref-9)