

“IMPROVING WORKING CONDITIONS: CONTRIBUTION TO ACTIVE AGEING”

ITALY

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Paola Astorri, Confindustria
Guido Girolami, Italian Pensioners' Union (CGIL)
Francesca Sperotti, Adapt

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PART I

DEMOGRAPHIC TRENDS AND LABOUR MARKET DEVELOPMENTS: AN OVERVIEW

1. Introductory remarks

Italy has currently the highest old-age dependency ratio of EU-27. In consideration of low fertility rates and high life expectancy – that are expected to persist – the old-age dependency ratio could rise to almost two-thirds (2 persons aged 65 or over out of 3 persons in their working age). Therefore, there is significant scope for enhancing labour force participation of disadvantaged groups, and in particular of older workers (those in the 55 to 64 age group) whose proportion in the workforce is projected to become the highest in 2030 ⁽¹⁾, as amounting to almost 25%. Some of the main obstacles hindering the employability of this group are:

- a lack of involvement in situations of on-the-job training;
- age discrimination
- work organization and working environment.

In order to realize the full potential in terms of employment opportunities there is a need of further implementing policies that keep older workers in the labour market and promote their participation into the economic and social life of the country. These should also include the provision of more favorable working conditions for this group, a widening engagement in education and training, the creation of high-quality and productive jobs, and the planning of a safe and healthy work environment, by evaluating the risks related to the age.

2. Demographic trends: an overview

2.1. Current situation

Population in Italy ⁽²⁾ is growing at a very slow pace, whereas the age structure of the population is becoming significantly older.

As for 31th December 2010, according to the Italian National Institute of Statistics (*Istat*) ⁽³⁾, the Italian population was estimated to be 60,626,442 people, that is 286,114 more than the previous year (+ 0.5%) and approximately 5 million people more than ten years ago ⁽⁴⁾. This increase mainly resulted from the migration flows from foreign countries ⁽⁵⁾ since the natural change considering the domestic population ⁽⁶⁾ followed a negative trend ⁽⁷⁾. Indeed, over the last year, migration flows reported an increase of 380,085 units ⁽⁸⁾ while natural change faced a decrease of 25,544 units ⁽⁹⁾ – the worst since 2003 – as a consequence of the negative difference between live births and deaths. In 2010, the Italian birth rate was 9.3 ⁽¹⁰⁾ while the mortality rate was 9.7 ⁽¹¹⁾ ⁽¹²⁾.

The lower number of births is caused by a fall in fertility rate among Italian women, starting from 2009 (1.33) and lasting over 2010 (1.29) ⁽¹³⁾. This means that the contribution given to the rate of birth on the part of immigrant women ⁽¹⁴⁾, about 18.8% ⁽¹⁵⁾, cannot compensate the negative trend

1 European Commission and Eurostat, *Demography Report 2010: Older, more numerous and diverse Europeans*, March 2011, p. 133.

2 The census in Italy is carried out by ISTAT every 10 years. The last four census were in 1971, 1981, 1991, 2001. The fifth census (2011) is on going.

3 Istat, *Bilancio demografico nazionale – Anno 2010*, 24 May 2011, p. 2.

4 Istat, *Indicatori demografici. Anno 2010*, 24 January 2011.

5 In 2010, the share of foreign people represented 7.5% of the overall population (a positive trend if compared to 2009).

6 The natural change is the positive difference between live births and deaths.

7 In one year (2009-2010), the number of births decreased (- 6,913). The number of deaths has been decreasing too (- 587,488) (Istat, *Bilancio demografico nazionale – Anno 2010*, op.cit., p. 2).

8 At the end of 2010 the share of foreign people amounted to 7.5% of the total population, thus reporting an increase if compared to 2009 when the figure was 7.0% (Istat, *Bilancio demografico nazionale – Anno 2010*, op.cit., p. 2).

9 Istat, *Bilancio demografico nazionale – Anno 2010*, op. cit., p. 2.

10 Crude birth rate is the nativity or childbirths per 1,000 people per year.

11 Mortality rate is a measure of the number of deaths in a population, expressed in units of deaths per 1000 individuals per year.

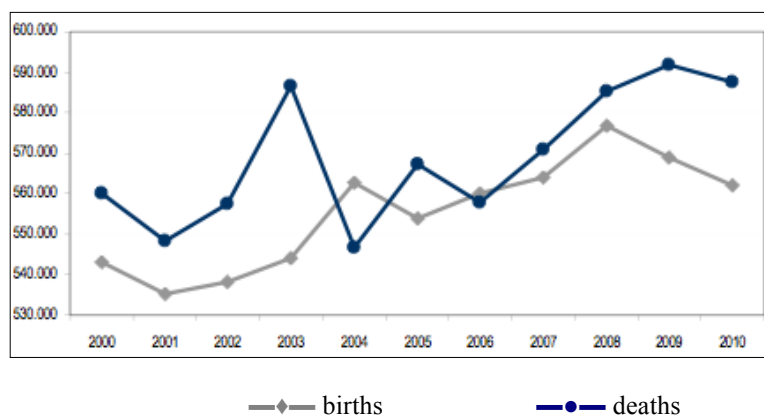
12 Istat, *Bilancio demografico nazionale – Anno 2010*, op. cit., p. 3.

13 Ibidem.

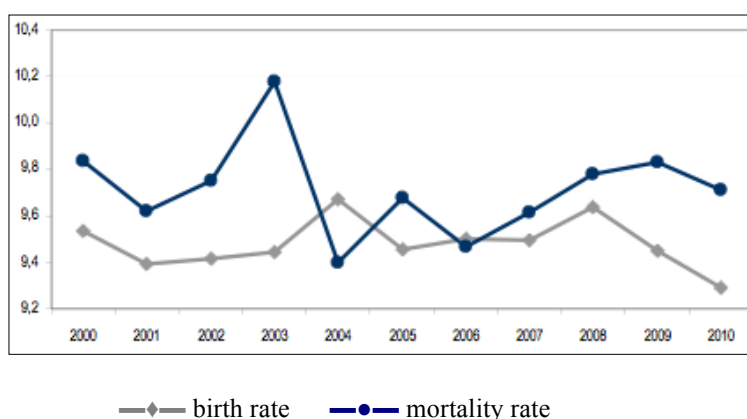
14 In 2000, there were 35,000 foreign mothers whereas they were 103,000 2010 (Istat, *Indicatori demografici. Anno 2010*, op.cit., p.

reported among the Italian ones, who are also postponing the age at which they have children. In this sense, the mean age of women in childbirth rose from 27.5 in 1980 ⁽¹⁶⁾ to 31.3 in 2010 ⁽¹⁷⁾.

Graph 1 - Natural change: births, deaths ⁽¹⁸⁾



Graph 2 - Birth and mortality rates ⁽¹⁹⁾



As a consequence of a lower mortality rate, life expectancy at birth has increased for both men and women: in 2010, life expectancy was equal to 79.1 for men (74.6 in 1993) and 84.3 for women (81.0 in 1993) ⁽²⁰⁾. For what life expectancy at age 65 concerns, it was 18.3 for men and 21.9 for women ⁽²¹⁾ in 2010, with both figures that reported an increased if compared to 1993, when they were 15.6 for men and 19.5 for women ⁽²²⁾, respectively.

2)

15 Istat, *Indicatori demografici. Anno 2010*, op.cit., p. 2.

16 European Commission and Eurostat, *Demography Report 2010: Older, more numerous and diverse Europeans*, op.cit., p. 29.

17 Istat, *Indicatori demografici. Anno 2010*, op.cit., p. 3.

18 Istat, *Bilancio demografico nazionale – Anno 2010*, op.cit., p. 3.

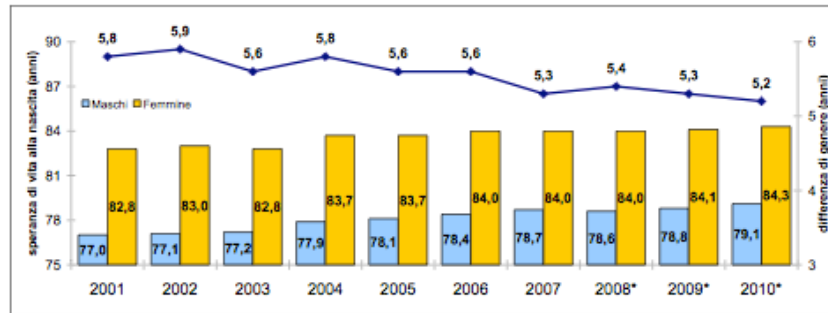
19 Istat, *Indicatori demografici – Anno 2010*, op.cit., p. 4.

20 European Commission and Eurostat, *Demography Report 2010: Older, more numerous and diverse Europeans*, op.cit., p. 33 and Istat, *Indicatori demografici – Anno 2010*, op.cit., p. 4.

21 Istat, *Indicatori demografici – Anno 2010*, op.cit., p. 5.

22 European Commission and Eurostat, *Demography Report 2010: Older, more numerous and diverse Europeans*, op.cit., p. 35.

Graph 3: Life expectancy at birth by sex and gender gap, Italy, 2001-2010 ⁽²³⁾

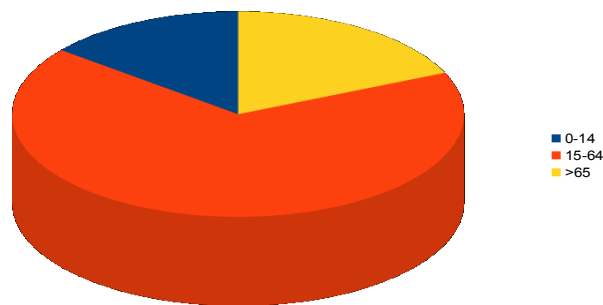


Due to the increase in life expectancy, the fall in fertility rates, and the large cohort of baby boomers entering their 60s, the age structure of population in Italy is becoming older.

In the last ten years, the percentage of people over 65 has increased by 1.8 million (from 18.4% in 2001 to 20.3% in 2011). In the same period, the number of young people under 15 years old has increased (+ 348,000 people), yet decreasing in percentage terms: in 2010 they amounted to 14% of the total population (14.3% in 2001). The working age population (15-64 years old) also shrank: from 67.3% in 2001 to 65.7% in 2011. The increase of the population over 85 has been particularly high. In 2001, the “oldest-old” were 1,234,000 – 2.2% of the total population – whereas they were 1,675,000 (2.8%) ⁽²⁴⁾ in 2010.

The ageing of the Italian workforce is apparent in the period 1990-2010. As reported by Eurostat ⁽²⁵⁾, in the last twenty years the Italian workforce (15-64 years old) reported an increase (+ 2.1%) but chiefly because of a rise in the share of people aged 50-64 (+ 11.1%) rather than the youngest cohort (15-49 years old), which, on the contrary, faced a 1.2% decrease.

Graph 4: Population distribution by age, Italy, 2001 ⁽²⁶⁾



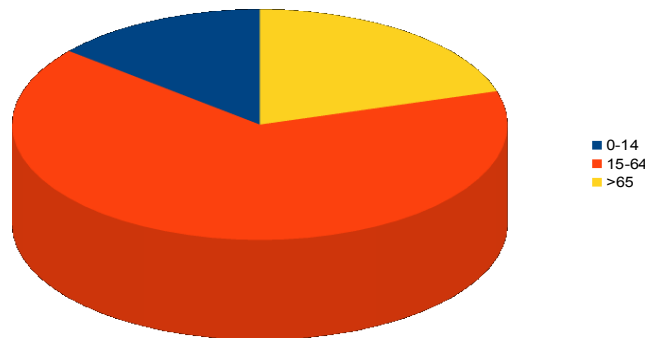
23 Istat, *Indicatori demografici – Anno 2010*, op.cit., p. 4.

24 Istat, *Indicatori demografici – Anno 2010*, op.cit.

25 <http://epp.eurostat.ec.europa.eu> (Last accessed: 22 December 2011).

26 Istat, *Indicatori demografici – Anno 2010*, op.cit.

Graph 5: Population distribution by major age groups, Italy, 2011 ⁽²⁷⁾



The increase of the older population (over 65) led to a rise in the median age: from 41.7 years in 2001 to 43.5 in 2011. The presence of the foreign population living in the country partly counterbalances the foregoing age structure. Indeed, the median age of foreign people is 31.8 years (22% of them are under 17 and 68.5% of them are under 40) ⁽²⁸⁾.

In a perspective of higher life expectancy and a fertility rate under the replacement level, the ageing process will be the most evident demographic trend in the coming decades. The median age of the population is foreseen to rise from 43.5 (2011) to 47.8 by 2035 and to 49.8 by 2059 ⁽²⁹⁾.

2.2. Future prospects

On the basis of the latest projections issued by Istat ⁽³⁰⁾, the Italian total population for the year 2065 will be only 1 million people larger than today, due to a persistent negative trend in natural change. By 2018, the natural change is likely to report a loss of 100,000 units per year, and in the following decades the gap between births and deaths is predicted to become larger. Between 2041 and 2052 natural change will probably report a loss of 300,000 units per year ⁽³¹⁾.

27 Ibidem.

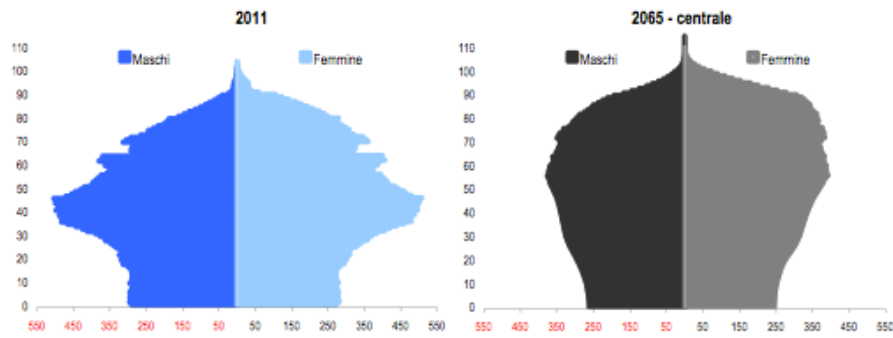
28 Ibidem, p. 9.

29 Istat, *Il futuro demografico del Paese – Previsioni regionali della popolazione residente al 2065*, 28 December 2011, p. 4.

30 Ibidem.

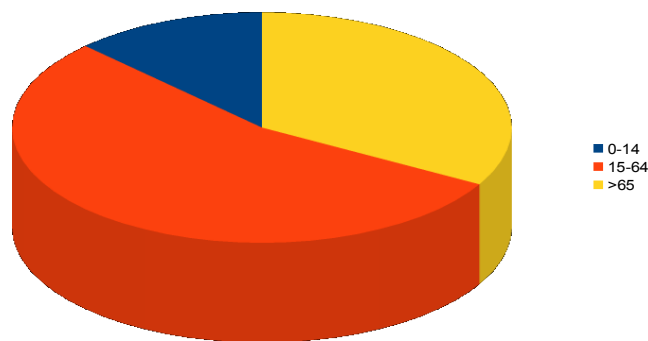
31 Ibidem, p. 3.

Graph 6: Population Pyramids, Italy 2011 and 2065 ⁽³²⁾



Accordingly, the future demographic dynamics of Italy will be determined mainly by the migration flows from foreign countries. According to Istat, by the year 2020 migration flows will bring 300,000 new entrants per year, a figure bound to decrease to 175,000 units by 2065. On the whole, Istat foresees that approximately 17,9 million of foreign people will immigrate by 2065 ⁽³³⁾. Nonetheless, the ageing of the population will be the most significant demographic trend. In 2056 young population in Italy (under 14 years old) will account for 12.5%, the population in the working age (15-64) for 54.3% and the population over 65 for 33.2% ⁽³⁴⁾.

Graph 7: Population by major age groups, Italy, 2056 ⁽³⁵⁾



This change in the age structure of the Italian population will have a major impact on intergenerational relationships. The young-age dependency ratio (population aged under 14 in relation to that aged 15-64) is predicted to decrease from 21.6% in 2011 to 20.6% in 2030, and then to increase to 23.1% in 2065. However, the old-age dependency ratio (population aged over 65 in relation to that aged 15-64) is a major concern: it is predicted to increase from 31% in 2011 to 61% in 2055 ⁽³⁶⁾.

32 Ibidem, p. 5.

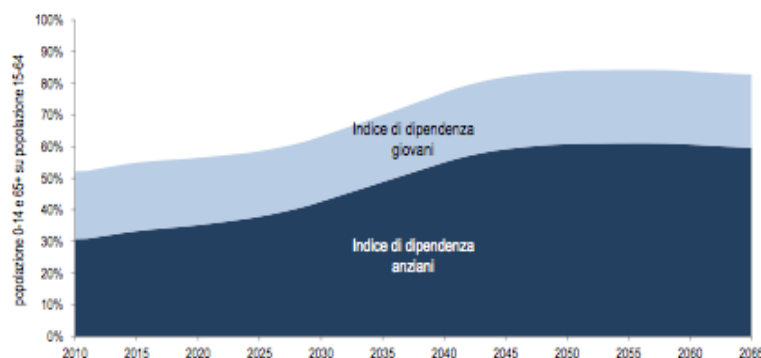
33 Ibidem, p. 3.

34 Ibidem, p. 1.

35 Ibidem.

36 Ibidem, p. 7-8.

Graph 8: Young-age and old-age dependency ratio, Italy, 2011-2065 (³⁷)

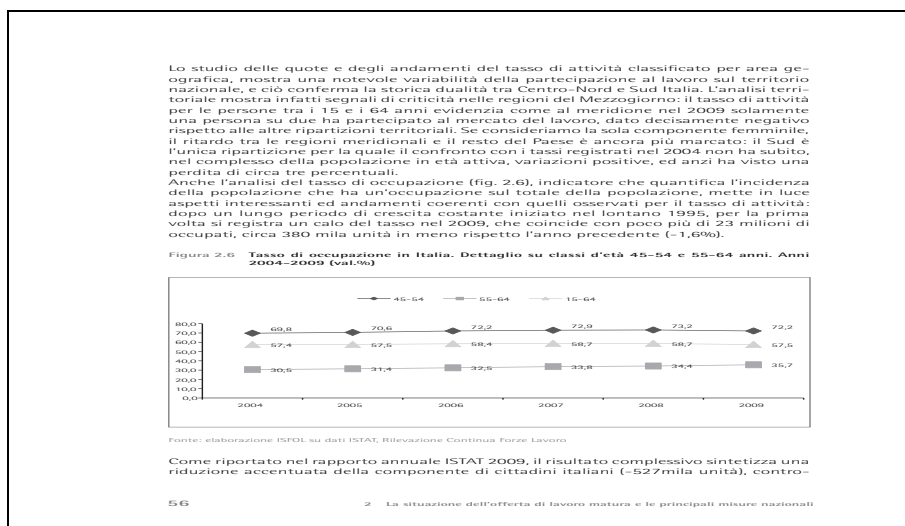


3. Labour market trends

According to the last data published by Istat (³⁸) the unemployment rate rose to 8.6 %, having increased up by 0.4 pp on November 2011. In particular, the youth unemployment rate is a major concern being at its worst level of 30.1% (+ 1,8 pp compared to the previous year).

Taking into consideration data from Eurostat on labour market by age group (³⁹), the Italian population over 65 shows lower employment rates (5.3%) compared to the two other main working groups: 71.3% (25-49 years old) and 48.4% (50-64 years old) (⁴⁰). The Italian employment rate of people over 65 (5.3%) is also lower compared to the EU-27 average of 7.7% (⁴¹). Isfol uses different classification by age, but the result is the same: older people are less employed than the youngest one. As reported by the following graph, people aged 55-64 have lower employment rates than people aged 45-64 (⁴²).

Graph 9: Italy, employment rates by age, 2004-2009 (⁴³)



37 Ibidem, p. 7.

38 Istat, *Occupati e disoccupati – Novembre 2011 e III Trimestre 2011*, 5 January 2012.

39 Eurostat, *Age Equality Indicators – Labour Market*, <http://epp.eurostat.ec.europa.eu> (Last accessed: 22 December 2011).

40 Ibidem, last update: 21st December 2011.

41 Ibidem.

42 Isfol, *Le azioni locali a supporto del prolungamento della vita attiva*, July 2011, p. 56.

43 Isfol on Istat data in Isfol, *Le azioni locali a supporto del prolungamento della vita attiva*, op.cit., p. 56.

There is a slight improvement - in term of employment rates – compared to the situation of ten years ago, although the older population was already a disadvantaged group in the Italian labour market. Indeed, in 2000, the population over 65 showed lower employment rates (4.4%) compared to the two other main working groups: 69.4% (25-49 years old) and 38.4% (50-64 years old) ⁽⁴⁴⁾. Despite the serious situation of young people, the older population (50-64 years old) is more likely to be affected by long-term unemployment (12 months or more): 55.2% versus 44.4% ⁽⁴⁵⁾. This also happened ten years ago, although with worse percentages: 60.8% versus 58.2% ⁽⁴⁶⁾. But the population over 65 years old is more likely to be employed part-time compared to the other age groups: 27.8% against 24.3% (15-24 years old), 15.3% (25-49 years old) and 11.3 (50-64 years old) ⁽⁴⁷⁾. However, the Italian share of people over 65 employed part-time is lower – almost the half – than the EU-27 one (55.1%). The same happens with the Italian percentage of people over 65 employed as temporary employees: 9.9% against the EU-27 average of 18.2% ⁽⁴⁸⁾. In 2009, the average exit age from the labour force was equal to 60.1, one percentage point lower than the EU27 average of 61.4 years old ⁽⁴⁹⁾.

4. A focus on older workers

4.1. Skills, training and career prospects

A solid educational foundation at primary, secondary and tertiary school level can have a major impact on the ability to progress through life. According to data on education provided by Eurostat ⁽⁵⁰⁾ Italy is lagging behind with only 27.5% of older people (55-64 years old) with upper secondary education, compared to the EU-27 average of 42.5% ⁽⁵¹⁾, and with 10.7% of the same cohort with tertiary education attainment, compared to 25.4% in Germany ⁽⁵²⁾. Therefore, it should come as no surprise that the share of older people with lower secondary education was very high in Italy in 2010: 61.8%, compared to the EU-27 average of 38.4% ⁽⁵³⁾.

The proportion of older people (55-64 years old) taking part in education and training remains low: 2.5%. Nonetheless, informal learning in the workplace plays a key role.

According to the 5th European Working Conditions Survey (EWCS 2010), 61.6% of people over 50 in Italy - above the EU-27 average (57.8%) - think that they have adequate skills to perform their duties. However, this percentage is slightly lower compared to that recorded in 2005 (62.2%) ⁽⁵⁴⁾.

As for what training schemes funded by the employers in the past year, 26.9% of people over 50 provide a positive answer, also reporting an improvement comparing to the situation of fifteen years ago. However, the relative percentage for the year 2010 in Italy remains below the EU-27 average of 31.4% ⁽⁵⁵⁾. These data are closely related to the percentage of people over 50 stating that they paid training for themselves. In 2010, they were 7.2%, which is more compared to the percentage recorded in 2005 (5.2%), but still below the EU-27 average (7.8%) ⁽⁵⁶⁾. In case of training funded by employer, it contributed to improve the way people over 50 carry out their working activity. Indeed, 92.8% of employers in Italy confirmed this state of affairs, a considerable share if likened to the EU-27 average (89.9%) ⁽⁵⁷⁾. On-the-job training was provided only to 15.7% of people over 50, yet this percentage – although lower than that one reported for people under 30 (25.5%) – increased

44 Ibidem.

45 Ibidem.

46 Ibidem.

47 Ibidem.

48 Ibidem.

49 Ibidem.

50 Eurostat, *Age Equality Indicators – Education*, <http://epp.eurostat.ec.europa.eu> (Last accessed: 22 December 2011)

51 Ibidem, last update: 27th May 2011.

52 Ibidem, last update: 8th June 2011

53 Ibidem, Last update: 27th May 2011

54 Eurofound, *EWCS (2010)*, <http://www.eurofound.europa.eu/surveys> (Last accessed: 25 January 2012).

55 Ibidem.

56 Ibidem.

57 Ibidem.

significantly since 2005, when only 5.9% of people over 50 reported to have on-the-job training in the previous year. However, much work lies ahead to reach the EU-27 average of 26.3% ⁽⁵⁸⁾. Due to their involvement in training programmes, 82.4% of workers over 50 feel that their job is more secure – the Italian percentage is higher than that in the EU-27 (66.1%) ⁽⁵⁹⁾ – and 68.7% think that their career prospects have benefitted from training (EU-27 percentage: 61.3%). Finally, in Italy 18.2% of people over 50 reported that their job provides for opportunities in terms of career advancement. However, the EU-27 data regarding this aspect is higher (21.5%) ⁽⁶⁰⁾.

4.2. Health and wellbeing

The increasing share of older people in the Italian population mainly results from the large cohort of baby boomers entering their 60s and marked falls in birth rates. Estimates indicate that 33% of the Italian population will be 65 years or more by 2050, meaning that health in the workplace become a key element in the company organization. Indeed, a share of healthier workers will be able to work longer as it grows older, allowing for higher productivity and labour participation. They will also need less healthcare, ultimately resulting in decreased pressure on public and private finances ⁽⁶¹⁾. The ageing population stresses the need for effective policies to promote healthy ageing, and to prevent diseases and injuries at the workplace. As stated by the European Commission ⁽⁶²⁾ an older labour force and longer working life does not imply less productive labour. The available data do not suggest that older workers are necessarily less productive and less innovative. The decline in physical and mental capacity occurs gradually at an older age and is dependent on the individuals concerned. It could even be reduced by preventive healthcare.

4.3. Work organisation

As stated by the European Commission ⁽⁶³⁾, in addition to incentives that supplement the retirement and tax systems, suitable working conditions are needed, including more flexible working-time and work organisation, together with employment opportunities for the ageing workforce. Such measures should help raise both the employment rate and the quality of working life of older people.

In Italy, in 2010, 66.7% of people aged over 50 declared to be able to choose or change their tasks order ⁽⁶⁴⁾, and 73.9% of the same age group said to be able to choose or change their work arrangements, and 78.7% to be able to choose or change the speed of work. In the EU-27 the situation is usually better than in Italy as regards the first case (69.4%) but worst with respect to work arrangements (70.4%) and in speed of work (71.8%).

In terms of working time, in 2010 24% of people over 50 years old said they work usually more than 40 hours per week, and they appear to be satisfied since the percentage of people over 50 that would not change the amount of hours worked per week is 64.6%. Moreover, 35.8% of people in this age group declare to work in the evening (from 6.00 pm to 10.00 pm) while those working at night (from 10.00 pm to 5.00 am) once (or more) in a month are 11.4%.

One of the solutions to improve work wellbeing and enhance work-life balance of older people is the introduction of flexible working arrangements such as flexible working times. This could be of particular interest for Italy, where 66.9% of people over 50 declared to have fixed starting and finishing times in their work, while the EU-27 average is 58,9%. In addition to changes of work arrangements, a consistent use of information and communication technologies (ICT), alongside *ad*

58 Ibidem.

59 Ibidem.

60 Ibidem.

61 European Commission, *Commission Communication to the European Parliament, The Council, the European Economic and Social Committee and the Committee of the Regions Dealing with the impact of an ageing population in the EU (2009 Ageing Report)*, COM(2009)180final, 29 April 2009, p. 10.

62 European Commission, *Commission Communication – The demographic future of Europe: from challenge to opportunity*, COM(2006)571final, 12 October 2006, p. 6.

63 European Commission, *Commission Communication...COM(2009)180final*, op. cit., p. 10.

64 In all this section, data and percentages are taken from Eurofound, *EWCS (2010)*, <http://www.eurofound.europa.eu/surveys> (Last accessed: 25 January 2012).

hoc training, is also indicated as a means to ease working life for older workers. In Italy, only 18.8% of people aged over 50 works with computers and a smaller share (14.1%) browse the Internet or resort to the email service.

PART II

ACTIONS AND POLICIES IN ITALY

1. Training opportunities

1.1. Actions and policies in Italy dealing with older workers' skill updating

Updating skills and skills development through training, re-training and lifelong learning initiatives have gained impetus since the adoption of the Lisbon Strategy in 2000, the EU overarching programme focusing on growth and jobs. Despite the ambitious programme of change, at the mid-point stage of Lisbon, the European institutions ascertained the lack of enough progress to reach Lisbon targets. Therefore, in 2005 the European Commission proposed a new start for the Lisbon Strategy focusing around two principal tasks: delivering stronger, lasting growth and creating more and better jobs ⁽⁶⁵⁾. In particular, the Commission affirmed the necessity of more and better investments into education and training: «by focusing at European and national level on skills and lifelong learning it will be easier for people to move to new jobs. This should be backed up by the adoption of the Lifelong Learning Programme at EU level and the presentation of national Lifelong Learning strategies by the Member States» ⁽⁶⁶⁾. On the basis of these assumptions, on 14th October 2005 Italy adopted its own Plan for innovation, growth and employment - called *PICO-Piano per l'Innovazione, la Crescita e l'Occupazione* – among whose targets there is the strengthening of education and training. In the same years, more attention started to be paid on older workers. As stated by the Council in its 2006 Joint Interim Report, until that moment insufficient priority and funding had been dedicated to increasing access to adult learning opportunities, especially for older workers. Priority to adult learning strategies started to be part of an integrated and comprehensive lifelong learning strategy ⁽⁶⁷⁾. In the same year, the European Commission recognized lifelong learning as a fundamental mean enabling transition from different stages in life. Easier access to lifelong learning must reach everyone and, in particular, those with lower skills and in less favourable employment conditions. While these areas are not new, demographic ageing makes them a priority investment in the future ⁽⁶⁸⁾. Indeed, two years later, Guideline number 23 of the 2008 Decision of the European Council on guidelines for the employment policies of the Member States ⁽⁶⁹⁾ specifically recalled older workers among the privileged targets of efficient lifelong learning strategies.

In parallel, in the framework of the European Social Fund 2007-2013 (ESF 2007-2013), Ministers of 32 European countries, the European Social Partners and the European Commission agreed to strengthen their cooperation with a view to offering all Europeans, whether they are young people, older workers, unemployed or disadvantaged, the qualifications and competences they need to be fully integrated into the emerging knowledge based society, contributing to more and better jobs. Among the key education and training issues for the ESF 2007-2013 there is the skills upgrading and competence development of older workers in view of increasing the employment rate of people aged 55-64 to 50% ⁽⁷⁰⁾. For the period 2007-2013, the ESF decided to support actions in all Member States and regions (Article 3.1 (d)), towards: a) “the design and introduction of reforms in education and training systems in order to develop employability, improving the labour market relevance of initial and vocational education and training and continually updating skills of training personnel with a view to innovation and a knowledge based economy” b) “the promotion of networking activities between higher education institutions, research and technological centres and enterprises”.

It is worth mentioning that the new programming period (2007-2013) presents a completely

⁶⁵ European Commission, Communication to the Spring European Council, *Working together for growth and jobs: a new start for the Lisbon Strategy*, COM(2005)24final.

⁶⁶ *Ibidem*, p.10.

⁶⁷ Council of the European Union, *Modernising education and training: a vital contribution to prosperity and social cohesion in Europe*, (2006/C 79/01), p. 4.

⁶⁸ European Commission, Commission Communication, *The demographic future of Europe – from challenge to opportunity*, COM(2006) 571 final, 12 October 2006, p. 9.

⁶⁹ Council, *Council decision 15 July 2008 on guidelines for the employment policies of the Member States* (2008/618/EC)

⁷⁰ European Social Fund, *Education and Training in the European Social Fund 2007-2013*, 2007.

renewed and more strategic approach. Following the dispositions of Structural Funds General Regulation (1083/2006) the structure of the new programming is based on strategic documents (*Community Strategic Guidelines* at European level and *National Strategic Reference Frameworks* at national level) and operative documents (*Operational Programmes*).

In accordance to the *Community Strategic Guidelines* adopted by the Council in October 2006 ⁽⁷¹⁾, the Italian *National Strategic Reference Framework*, which is not limited to Structural Funds but also related to national additional resources implying a seven-year programme engagement, foresees 4 basic macro-objectives: 1) developing knowledge systems; 2) improving life quality, safety, and social inclusion; 3) strengthening productive chains, services and competitiveness; 4) internationalising and modernising economy, society and administration ⁽⁷²⁾.

The Italian *Regional Operational Programmes* (ROPs) foreseen by the National Strategic Framework and approved by the European Commission in December 2007, are the result of a strong partnership between regions, social partners and Ministry of Labour, Health and Social Policies. In Italy, there are 21 ESF Regional Operational Programmes. Sixteen ROPs concern Regions and Autonomous Provinces under the regional *Competitiveness and employment* objective and five concern Regions under the *Convergence* objective. The priority axes of the ROPs are: 1) Adaptability; 2) Employability; 3) Social inclusion; 4) Human capital; 5) Transnationality and interregionality 6) Technical assistance – Institutional capacity (only for regions under the Convergence objective).

Through interventions of different nature, such Programmes offer a wide range of new opportunities for the qualification of human capital and for a stronger relationship with the labour market (e.g. training actions, integrated pathways, support to labour services and women employment, interventions for disadvantaged people and active ageing, analysis of needs, etc.) ⁽⁷³⁾.

Together with the *Regional Operational Programmes*, there are 3 National Operational Programmes (NOPs), two of which are held by the Ministry of Labour, Health and Social Policies. Under the *Regional competitiveness and employment* objective there is “*Azioni di sistema*” NOP (“System’s actions”) held by the Ministry of Labour and Social Policies, while, under the *Convergence* objective there are “*Governance e Azioni di sistema*” NOP (“Governance and System’s actions”) held by the Ministry of Labour, Health and Social Policies, and “*Competenze per lo sviluppo*” NOP (“Skills for development”) held by the Ministry of Education, University and Research.

In general, these Programmes meet the need of ensuring one unique intervention for vocational training and labour policies strongly linked with ROPs with the aim of producing a close matching between supply and demand for skills and providing an easier access to the labour market. In particular, “*Competenze per lo sviluppo*” NOP focuses on human capital and promotes interventions supporting and fostering the innovation of the education system. It aims at increasing the participation and quality in education. Its action is also aiming at increasing the institutional capacity of public administration to manage the educational system ⁽⁷⁴⁾.

In 2009, almost ten years later the launch of the Lisbon Strategy, the EU Member States and the European Commission strengthened co-operation with strategic framework for European cooperation in education and training (“ET 2020”) a follow-up to the earlier Education and Training 2010 work programme launched in 2001. This approach recognises that, in a rapidly changing world, education, training and lifelong learning need to be a priority: they are the key to employment, economic success and allowing people to fully participate in society. Indeed, as stated by the Council conclusion on “ET 2020” ⁽⁷⁵⁾, the challenges posed by demographic change and the

⁷¹ Council, *Council decision of 6 October 2006 on Community strategic guidelines on cohesion*, (2006/702/CE).

⁷² Ministero del Lavoro, della Salute e delle Politiche Sociali, *European Social Fund 2007-2013*.

⁷³ Ibidem.

⁷⁴ Ministero della Pubblica Istruzione, *Programma Operativo Nazionale “Competenze per lo sviluppo”, Fondo Sociale Europeo, Obiettivo Convergenza*, 2007 IT 05 1 PO007, 28 settembre 2007.

⁷⁵ Council of the European Union, *Council conclusions of 12 May 2009 on a strategic framework for European cooperation in education and training (‘ET 2020’)*, (2009/C 119/02), p. 3.

regular need to update and develop skills call for a lifelong approach to learning and for education and training systems, which are more responsive to change and more open to the wider world. As further stressed by the European Commission, a high level of educational attainment is associated with higher labour force participation and therefore it is a precondition for lifelong learning and hence the ability of older workers to remain on the labour market (⁷⁶).

At the national level, the “White paper for future social model” (⁷⁷) explicitly recalled lifelong learning as a key strategy for labour relations. Yet, the document claimed that widespread lifelong learning opportunities were missing in Italy, due to the self-referential nature of training policies in the country. The White Paper also denounced that training opportunities in Italy were still confined to traditional learning assets, that is to say formal learning in classes and lectures.

The 2008-2009 economic crisis, and the subsequent changing occupational structure in Europe and in Italy, made the public debate on training, competences updating and upgrading as well as lifelong learning for older workers most significant. Skills upgrading ensuring a better match between the supply of skills and labour market demand became two elements for Europe’s short-term recovery and longer term growth and productivity, for its jobs and its capacity to adapt to change, for equity, gender equality and social cohesion (⁷⁸). This is particular true with reference to an older workforce: the possibility of renewing and expanding skills throughout careers in order to have the possibility to stay employable, work longer and make career changes became crucial (⁷⁹). Indeed, in line with the *Agenda for new skills and new jobs*, one of the main goals at European and at national level is to strengthen the capacity to anticipate changing labour demands in the economy, and to secure matching qualifications, which increasingly have to come from an ageing labour force, rather than young people entering the labour market. The main problem is that older workers are often more susceptible to skills obsolescence. Thus, the role that training and lifelong learning in creating and sustaining skill mismatches has become more significant for older workers too.

Italy’s last policies to tackle the recent economic crisis have also concerned aspects related to active ageing. This has been most visible with the Agreement between the Italian Government, Regions and Autonomous Provinces of Trento and Bolzano signed on 12th February 2009. In line with the European guidelines and the European Social Fund’s priorities (⁸⁰) the Agreement confirmed Article No. 19 of Law No. 2/2009 (⁸¹) which promotes a set of measures aimed at tackling unemployment by focusing on human capital, and in particular, on that of older workers at risk of exclusion from the labour market. According to this Agreement, these measures are financed by regional resources (30%) as set by the so abovementioned Regional Operative Programmes (ROPs).

⁷⁶ European Commission, *Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions dealing with the impact of an ageing population in the EU (2009 Ageing Report)*, COM(2009) 180 final 29 April 2009, p. 8.

⁷⁷ Ministero del Lavoro, della Salute e delle Politiche Sociali, *Libro Bianco per il futuro modello sociale. La vita buona nella società attiva*, May 2009.

⁷⁸ See Communication from the Commission to the European Parliament, the Council, the European Parliament, the Council, the European and Social Committee and the Committee of the Regions, *New Skills for New Jobs Anticipating and matching labour market and skills needs*, COM(2008) 868 final, 16 December 2008.

⁷⁹ European Commission, *New Skills for new Jobs: Action Now*, 2010, p. 13

⁸⁰ Supporting the development of “human capital” is a priority for the European Social Fund (ESF). In the framework of the EFS 2007-2013 Ministers of 32 European countries, the European Social Partners and the European Commission agreed to strengthen their cooperation with a view to offering all Europeans, whether they are young people, older workers, unemployed or disadvantaged, the qualifications and competences they need to be fully integrated into the emerging knowledge based society, contributing to more and better jobs. Among the key education and training issues for the EFS 2007-2013 there is the skills upgrading and competence development of older workers. The target for the employment rate for 55-64 year olds is 50%. Older workers are currently under-represented in the uptake of training, though it could certainly contribute to increasing their employment rate (*Education and Training in the European Social Fund 2007-2013*).

⁸¹ Legge 28 gennaio 2009, n. 2, *Conversione in legge, con modificazioni, del decreto-legge 29 novembre 2008, n. 185, recante misure urgenti per il sostegno a famiglie, lavoro, occupazione e impresa e per ridisegnare in funzione anti-crisi il quadro strategico nazionale*, published in “Gazzetta Ufficiale” n. 22 of 28 January 2009.

At national level, particular attention to the disadvantaged older workers has been given by the 2010 Government Budget ⁽⁸²⁾ and the “*Manovra correttiva*” ⁽⁸³⁾ which, in particular, foresee:

- the financing of national insurance contributions of those companies hiring older workers (over 50) receiving unemployment and mobility benefits;
- the financing the contributions lacking to reach the retirement age of those workers (with 35 years of contributions) receiving income benefits;
- an increase in number of production sectors and companies receiving income benefits for their workers;
- benefits for private employment agencies for disadvantaged groups’ placement.

Later, one of the most important step reached by the Italian Government, Italian Regions and the social partners has been the signature, on 17th February 2010, of an inter-institutional agreement: the so called “Guidelines for Continuous Training in 2010” ⁽⁸⁴⁾. By recognizing that training represents a positive answer to the challenges entailed by labour market changes, including the recent jobs’ crisis, the Guidelines aim at orientating how to manage the budget that Italy allocated for workers’ training in 2010 - equal to 2.5 billion euro - with particular focus on unoccupied people and unemployed workers, as well as those who are granted unemployment benefits and those facing temporary layoffs (redundancy fund recipients, and those eligible for redundancy pay more generally according to ex. Art. No 19 of Act No. 2/2009). The document, although it is focused on 2010, it emphasises the importance of continuous training as a social protection tool that enhances employability, and guarantees workers more safety. However, the basic idea underpinning the guidelines is that training – in general but also for adult workers – should be based in the company. Curricula should give prominence to work based learning, on-the-job skills development, and they should be jointly drafted with social partners, bipartite organisms, in order to favour training investments that:

- a) are aimed to the weakest bands of the labour market, therefore including older workers involved in restructuring processes;
- b) are organized in working environments or close to them;
- c) answer the real qualification and requalification needs of workers involved in occupational transitions, which will characterize the labour market in 2010;
- d) are drafted for placement, aiming at creating a dynamic and flexible matching of labour supply and demand and at making more effective the link – or integration – between the educational system and the labour market, so that it is possible to answer territorial and sectoral skill needs.

The Italian Guidelines for adult workers’ training in 2010 provide five indications for designing, managing and evaluating workers’ training in times of crisis. For what training opportunities for older workers concern, it is worth mentioning some of the points of the Guidelines, namely:

Point 1) favouring an effective answer to the professional and competences’ needs of companies and workers. To this end, skill needs should be collected by a number of entities on local territories, including bipartite training funds, labour consultants, employment agencies, etc. The Minister of labour will collect and coordinate all information and make them available for workers and companies;

Point 2) the promotion of a competence based pedagogical approach. Training provision should be conceived in terms of “competence development” and no more in terms of courses or disciplines.

⁸² Law n. 191, 23 December 2009 (so called “Finanziaria 2010”).

⁸³ Law n.122, 30 July 2010.

⁸⁴ Intesa tra Governo, Regioni, Province Autonome e Parti Sociali, *Linee Guida per la Formazione nel 2010*, 17 February 2010.

Point 4) adults training, to be promoted through:

- a) training-labour agreements, which allow workers who are granted unemployment benefits to go back to the company and be trained on the workplace, maintaining the benefit;
- b) using bilateral training funds resources for financing continuous training for redundancy fund recipients hired in 2010, provided that the company the worker belonged to was contributing to that specific fund;
- c) creating information points by bipartite bodies and employment services (public, private, authorized and accredited) for workers of all age. Such info point should take care of the workers, orientate and make them responsible in light of their return to the labour market;
- d) training programs in working places, also when inactive, and at the VET centres that look like productive contexts and adequate stage periods by the company;
- e) using inactive workers as tutors for training and vocational activities, including apprenticeship contracts, after they have properly trained for covering this role;
- f) promotion of the “*contratto di inserimento*”⁽⁸⁵⁾ especially for older 50 workers, young people and women, by strongly working on the professional needs to be decided by companies and workers⁽⁸⁶⁾.

As pointed by the Guidelines, bilateral training funds⁽⁸⁷⁾ are called to play a key role. However, just few of them planned - as it appears in their “*Piano Operativo delle Attività – POA*” (“Plan of Actions”) - to include older workers as specific target group of the training activities funded by them. This is the case of Fondimpresa and Fonter. The first one, in its POA of 2004 decided to promote a set of sectorial and territorial plans - called “*Programmi di Preminente Interesse Settoriale e Territoriale (PISTE)*” – with the aim of – among the others - tackling the difficult employment situation of people over 45. In the POA of the second training fund, Fonter, workers over 45 are among the target groups of its funding for training activities. Taking into consideration the on going “*Notices*” (*Avvisi*) it is worth mentioning, on the one side, the Notice n.5/2011 of Fondimpresa, which gives priority to those training plans presented by companies for their older employees (over 45); and on the other side, the notices of Fond.Coop, Fondo Dirigenti PMI and Fondartigianato, which, in the framework of state aids⁽⁸⁸⁾, foresee an additional score for those training plans addressed for disadvantaged workers, such as older workers. Finally, in the field of bilateral training funds, it is worth here mentioning the initiative undertaken by, the Italian training fund for banks and insurances companies (*FBA – Fondo Banche e Assicurazioni*), which provided 6

⁸⁵ “*Contratto di inserimento*” is a contract enabling the access to the labour market of specific bands of the population. This contract is ruled by artt. 54-59 of the legislative decree n.276 of 2003, under Heading II. According to article 54, specifying the subjects entitled to sign a “*contratto di inserimento*”, letter c) quotes unemployed workers, older than 50 years old. Art. 55 specifies that this contract requires an individual project for entering the labour market. This project aims at guaranteeing that the workers’ professional skills are adequate to the working environment he is supposed to enter. As a consequence, although the juridical cause of this contract is not linked to training itself, its implementation concretely consists in a learning activity, aiming at skills updating and upgrading for the labour market needs. The European Court of Justice though judged this contract as a measure equivalent to State aids and therefore nowadays it is still not fully working in Italy.

⁸⁶ This section on the Guidelines is taken from the Elder’s Final Report presented to the European Commission, *ELDERS – Elder employees in companies experiencing restructuring: stress and well-being*, Modena, 2009-2010, p. 351 ss.

⁸⁷ The Italian bilateral training funds are regulated by article 118 Law n. 388/2000 (Financial law 2001). This article has been integrated and modified by art. 48, Law n. 289/2002 (Financial law 2003).

⁸⁸ Art. 4 of the Decree of the Ministry of Labour, Health and Social Policies n. 148 adopted on 24th June 2003, establishes that the resources given to bilateral training funds shall observe the European legislation in the field of State Aid. Therefore, those training measures funded by bilateral training funds shall be considered as State Aids, in observance to: a) Commission Regulation (EC) No 800/2008 of 6 August 2008 declaring certain categories of aid compatible with the common market in application of Articles 87 and 88 of the Treaty (General block exemption Regulation); b) Commission Regulation (EC) No 1998/2006 of 15 December 2006 on the application of Articles 87 and 88 of the Treaty to the minimis aid. In this case, companies applying for a state aid receive a funding or co-funding when their training plans are addressed to older workers, considered as disadvantaged workers.

million euros for financing professional training and up-skilling courses for older workers (over 50). This FBA's initiative was intended to invite companies to apply for these funds by presenting training for their employees over 50, enabling the latter to update their skills and transfer them to the youngest employees, by playing a mentor, coach or tutor's role (⁸⁹).

The Agreement signed between the Italian Government, Italian Regions and Autonomous Provinces of Trento and Bolzano on 12th February 2009 is further confirmed by the Agreement between the Italian Government and the Italian regions on 21st April 2011. In particular, in this document the Government and the Regions agree to plan and implement active labour policies in favour of workers beneficiary of safety net measures – among these people a large shared is represented by people aged 45-65 years old - through training policies organized in line of skills needs expressed by the economic sectors, businesses and workers.

Regional and local actions

In Italy, regional and local rules addressed to older workers are 44 distributed among 18 Regions (mostly in the North of Italy). It is possible to classify them at different levels: 13 regional laws, 2 provincial laws, 4 regional regulations, 1 provincial regulation, 10 resolutions and 2 law proposals. The most active Regions are Friuli-Venezia Giulia and Liguria. On the basis of the content of the abovementioned rules, it is possible to observe that policy makers act at different levels: in some cases they try to extend the use of safety net measures, in some others they support outplacement through vocational training or incentives to companies to hire people over 50 (⁹⁰). As reported in Table n. 1, most of the measures aim at improving the worker's employability/adaptability and the match between labour supply and demand, and the European Social Fund mostly finances them. As reported in Table n. 2 the measures address to unemployed and a mixed group ("other"), which include both employed and unemployed people over 45.

Table n. 1: Measures by typology and funding (⁹¹)

Type of measures	Distribution (%)	ESF (%)	National funding (%)	Regional funding (%)	Other funding (%)
Tackling physical efforts in the workplace	0.5	0.0	0.0	0.0	100.0
Campaign for promoting health and safety	0.2	100.0	0.0	0.0	0.0
Tackling discrimination	0.7	66.7	0.0	0.0	33.3
Increasing employability/adaptability	61.4	64.7	9.6	9.6	15.3
Labour demand and supply match	24.8	33.7	29.7	29.7	24.8
Self-employment creation	2.9	25.0	8.3	8.3	41.7
Company restructuring/crisis	2.2	77.8	0.0	0.0	22.2
Development of company's skills	1.5	33.3	33.3	33.3	33.3
To increase awareness of	1.0	50.0	25.0	25.0	25.0

⁸⁹ For more information of FBA's project "Over 50: un progetto per il futuro" please visit:

<http://www.fondofba.it/argomenti-di-studio-dettaglio.asp?id=6> (Last accessed: 20 march 2012).

⁹⁰ Isfol, *Le azioni locali a supporto del prolungamento della vita attiva*, I Libri del Fondo Sociale Europeo, June 2011, p. 60.

⁹¹ Sources: Isfol, *Le azioni locali a supporto del prolungamento della vita attiva*, op. cit., p. 68-69.

those benefits available for a longer working life					
Benefits for flexible contractual arrangements	1.0 – 1.5	0.0	0.0	0.0	100.0
Supporting gradual retirement	2.2	11.1	0.0	0.0	44.4
Total	100.0	52.5	14.3	14.3	22.2

Table n. 2: Measures by target group ⁽⁹²⁾

Type of measures	Employed	Workers in mobility or in CIG ⁽⁹³⁾	Unemployed	Companies	System's operators	Other
Tackling physical efforts in the workplace	100.0	0.0	0.0	0.0	0.0	0.0
Campaign for promoting health and safety	100.0	0.0	0.0	0.0	0.0	0.0
Tackling discrimination	33.3	0.0	0.0	0.0	66.7	0.0
Increasing employability/adaptability	30.8	5.6	36.4	1.2	0.0	26.0
Labour demand and supply match	5.0	9.9	63.4	14.9	0.0	6.9
Self-employment creation	0.0	8.3	58.3	8.3	0.0	25.0
Company restructuring/crisis	22.2	66.7	11.1	0.0	0.0	0.0
Development of company's skills	100.0	0.0	0.0	0.0	0.0	0.0
To increase awareness of those benefits available for a longer working life	25.0	0.0	0.0	0.0	0.0	0.0
Benefits for flexible contractual arrangements	0.0	0.0	0.0	0.0	0.0	100.0
Supporting gradual retirement	0.0	0.0	11.1	0.0	0.0	88.9
Total	23.3	7.6	40.3	4.7	0.5	23.6

As stated before, the Italian *National Strategic Reference Framework* provides a general framework of the guidelines through which the Government aims at improving its level of development, economic growth and competitiveness in line with the European Employment Strategy. It is the main point of reference for the *Regional Operational Programmes*:

Abruzzo

In this Region, the number of actions in support of older workers (over 45) - in terms of active ageing - is still limited. Despite this, the Region has undertaken some significant initiatives. The ROP 2007-2013 deals with active ageing and, in particular, it foresees: training activities addressed to specific target groups (among which there are over 45) ⁽⁹⁴⁾; the promotion of policies aiming at protecting disadvantaged workers (among which there are older workers) ⁽⁹⁵⁾; integrated actions

⁹² Source: Isfol, *Le azioni locali a supporto del prolungamento della vita attiva*, op. cit., p. 69.

⁹³ Cassa Integrazione Guadagni/Wage Guarantee Funds.

⁹⁴ ASSE I - Adattabilità, Ob. specifico 1.a) "Sviluppare sistemi di formazione continua e sostenere l'adattabilità dei lavoratori / Axis I – Adaptability, Objective 1.a) Developing lifelong learning systems and supporting older workers' adaptability.

⁹⁵ ASSE I - Adattabilità, 'Ob. specifico 1.b) "Favorire l'innovazione e la produttività attraverso una migliore organizzazione e qualità del lavoro / Axis I – Adaptability, Objective 1.b) Fostering innovation through a better

aiming at re-collocate unemployed and those workers in mobility or those workers aged over 45 that found themselves excluded from the labour market. Under the *Objective 1.a* it is worth mentioning the project “*Recupero e consolidamento delle competenze chiave*” (“Key skills consolidation and development”) which, by supporting training activities for developing and consolidating vocational skills, gives particular attention to older workers (over 45). Furthermore, the Abruzzo Region took part into an European project which offered the possibility for people over 50 to spend a training and working experience abroad (⁹⁶).

Aosta Valley

In the last years this Region has undertaken several actions in order to promote older people’s participation into the labour market and in training activities. Through the 2007-2013 ROP, the Region aims at sustaining a longer working life also through specific training and skills development actions. In particular, it is worth recalling the decision of the Region – in 2009 – to promote a wide range of training activities addressed to adult employees (in particular those aged 55-64) such as specialization and higher education courses (⁹⁷).

Basilicata

In this Region there are few regional initiatives in support of older workers, although active ageing issue is mentioned in the ROP 2007-2013. Indeed, among the actions to be implemented in the territory, the document sets: training and retraining for Public administration’s employees, self-employed, professionals, with particular attention to specific groups such as women, over 45 and over 50; and the introduction of lifelong learning systems for low-skilled workers and older workers.

The Autonomous Province of Bolzano

In the last years, in the framework of the ROP 2007-2013, the Preliminary Strategic Document and the Labour Policy Plan 2007-2013, this Province activated several political actions to tackle the risks of social exclusion, giving particular attention to older population, immigrants and women. In particular, the Province funded: outplacement plans for low skilled people over 50 that remained unemployed; skills development and skills updating programs for employees over 50; knowledge transfer pathways from the older workforce to the youngest one. The *Public Notices* (⁹⁸) published by the Province are addressed to finance training projects aiming at promoting active ageing, increasing older workers participation rate in the labour market, supporting self-employment, counselling and other training activities for older workers’ outplacement (⁹⁹).

Calabria

Both the Regional Strategic Document (*Documento Strategico Regionale - DSR*) for the Cohesion Policy 2007-2013 – under the general objective “*Rafforzamento e razionalizzazione delle politiche dell’istruzione e del lavoro*” (“Strengthening and rationalisation of labour and education policies”) - , and the ROP 2007-2012 - under the Axis II *Occupabilità* (“Employability”) - deal with active ageing. However, in terms of training, it is possible to mention just the “*Replay Project*” (“*Opportunità di formazione per 12 donne over45*”) – aimed at providing vocational training to women over 50 – unemployed or disadvantaged - living in the Province of Crotone (¹⁰⁰).

work organization and quality of work.

⁹⁶ Isfol, *Le azioni locali a supporto del prolungamento della vita attiva*, op. cit., p. 113-114.

⁹⁷ Ibidem, p. 159-160.

⁹⁸ Bando sulle modalità di presentazione dei progetti di formazione da realizzare con il contributo del Fondo sociale europeo, Obiettivo competitività regionale e occupazione, Programma operativo 2007- 2013 per il periodo 2007-2008; Avviso per la presentazione di Progetti di formazione da realizzare con il cofinanziamento del Fondo sociale europeo per il periodo 2008-2009 a valere sull’Asse I Adattabilità, Asse II Occupabilità, accessibilità e invecchiamento attivo, Asse III Inclusione sociale, Asse IV capitale umano.

⁹⁹ Isfol, *Le azioni locali a supporto del prolungamento della vita attiva*, op. cit., p. 116-117.

¹⁰⁰ Ibidem, p. 117-118.

Campania

Thanks to the main directive documents (ROP 2007-2013 and the Regional Social Plan 2009-2011), the Campania Region seems to be active in terms of active aging, lifelong learning for older workers, and retaining older workers in the labour market. However, the regional legislative and political action in favour of older workers appears to be scarce, comparing to the one undertaken by the Provinces. In this section, it is worth mentioning the public notice published by the Region to realize and manage “study clubs” (*circoli di studio*) supporting the Adult Learning Regional System (¹⁰¹). Moreover, the Campania Region is involved in the European Project “*Maieuta- Emersione delle competenze pregresse, non formali e informali*” (“Emersion of formal and informal skills”) aimed at sustaining the outplacement of people over 40. At legislative level, it is also possible to mention the law proposal “After work there is the world: Institution of territorial centres for older people outplacement in the economic activities” (“*Dopo il lavoro c’è il mondo - Istituzione di centri territoriali per il reinserimento degli anziani nel tessuto produttivo della società*”) presented by the Istituto Tecnico Commerciale Statale “Gaetano Filangieri” in Frattamaggiore (Naples) to the Parliament in 2007 and to Strasburg in 2008, with the general aim of elaborating projects able to improve the working condition of older workers (over 65) through the development of IT skills and the use of “buoni lavoro” (Legge Biagi) (¹⁰²).

Emilia-Romagna

In the last years the Emilia-Romagna region has financed several interventions aimed at strengthening older workers’ skills in order to avoid their exclusion from the labour market and support active ageing. The funded interventions deal with training activities (vocational training, internship, flexible training activities, adult training ect.) and matching between labour supply and demand. As it happens for the other Regions, the active ageing issue is a topic dealt in the main directive documents such as the ROP 2007-2013 under the Competitiveness and employment Objective (*Obiettivo “Competitività regionale e occupazione”*), the relative Communication Plan (*Piano di Comunicazione*) and the Single Planning Documents (*Documenti Unici di Programmazione*). Furthermore, it is worth mentioning that several Provinces – such as Rimini, Ravenna, Ferrara, Forli-Cesena and Modena – published public notices addressed to those aged over 40, over 45 and over 50 in the field of skills development, retraining and employment stability or incentives for university or other training courses (¹⁰³).

Friuli-Venezia Giulia

In the last years this Region gave particular attention to active ageing by financing several initiatives addressed to improving the working situation of older workers (employed, unemployed, close to retirement age, low-skilled ect.). In particular, on 9th August 2005 the Region issued the Regional Act n. 9 “Regional dispositions for employment, protection and work quality” (“*Norme regionali per l’occupazione, la tutela e la qualità del lavoro*”) where Art. 34 mentions vocational training for older workers as a specific mean to sustain active ageing and the extension of working life. These topics also characterize the ROP 2007-2013 (Objective 2) and the document “Guidelines for a new Regional labour law” (“*Linee guida per una nuova legge regionale in materia di lavoro*”) which, among those means able to sustain active ageing, mentions: incentives for the extension of the working life; transition from working to retirement; vocational training aimed at skills match; incentives for part-time jobs. Finally, it is worth mentioning the close collaboration between the Province of Pordenone and the Employment Services that, through the PARI Program, promoted

¹⁰¹ Avviso Pubblico di manifestazione d’interesse per la realizzazione di Circoli di Studio a sostegno del sistema di Educazione degli Adulti (Eda) della Regione Campania, finanziato attraverso il POR Campania 2007-2013 (Pubblicato sul BURC n. 60 del 7 ottobre 2009).

¹⁰² Isfol, *Le azioni locali a supporto del prolungamento della vita attiva*, op. cit., p. 118-120.

¹⁰³ Isfol, *Le azioni locali a supporto del prolungamento della vita attiva*, I Libri del Fondo Sociale Europeo, June 2011, p. 121-122.

measures to provide incentives to hire people over 45 and 50, and incentives to provide training for skills updating (¹⁰⁴).

Lazio

In the last years, the Lazio Region gave particular attention to older workers, in particular those at risk of exclusion due to the recent economic crisis. Indeed, the Region has promoted several employment actions such as training activities (vocational training, work experience ect.) and actions for a better match between labour supply and demand.

At legislative level, on 6 November 2009 the Region adopted the Regional Act n. 28 “Employment and Outplacement Measures for over 40” (*“Misure a sostegno dell’occupazione e del reinserimento nel mondo del lavoro per coloro che hanno superato i quaranta anni di età”*) in which unemployed aged over 40 are identified as one of the main target group. The regional act aims at tackling the risk of social exclusion and promoting older workers participation into the labour market through incentives to companies to provide training and promote training and retraining courses. Furthermore, through the Preliminary Strategic Document 2007-2013 (*Documento strategico preliminare* ¹⁰⁵), the ROP, and the Plan for active labour policies 2007-2009 (*Piano Pluriennale per le politiche attive del lavoro*), the Region committed itself in three directions: traditional interventions for employability (information, counselling, training); innovative actions aimed at preventing skills obsolescence and better evaluating adult experience; initiatives preventing and tackling companies’ crisis. At provincial level, it is worth mentioning the notice published by the Province of Rome at the end of 2009. This notice aimed at tackling labour market exclusion of workers over 40 through: training courses integrated with stabilization initiatives; vocational counselling; counselling and training initiatives (¹⁰⁶).

Liguria

Liguria is the Italian region with one of the highest percentage of people over 65. As a result, it adopted several legislative acts in favour of active aging and older workers. One example is given by the Regional Act n. 48, adopted on 3rd November 2009 titled “Active ageing promotion” (*“Promozione e valorizzazione dell’invecchiamento attivo”*) which considers older people as a resource and not as a burden. In particular, it recognizes lifelong learning as the right lever to maintain older people active in the workplace and in the society. Older people are also at the core of the ROP 2007-2013, which underlines that, in order to increase participation rates, it is important to undertake targeted actions for people over 54. Under this objective, the Region promotes lifelong learning activities and incentives to provide training to people over 50. This focus is given also by the “Three-years Regional Training and Education program 2010-2012” (*Programma Triennale regionale dell’istruzione, della formazione e del lavoro 2010-2012*) which sets, among the general objectives, skills and knowledge development in a lifelong learning perspective, in particular for those aged over 40 and over 54.

At provincial level, it is worth mentioning that, since 2009, the provincial administrations promoted computer sciences courses for the older population. Moreover, all Provinces published notices for implementing training initiatives giving a particular priority to people over 45 (¹⁰⁷).

Lombardy

The interventions of this Region have been mainly addressed to unemployed people - or at risk of exclusion from labour market - and just in some cases the target group has been identified with people over 45 or over 50. Most of initiatives are training activities (vocational training, work experience ect.) or incentives to companies to provide training. The Regional Act n. 22, adopted on

¹⁰⁴ Ibidem, p. 123-126.

¹⁰⁵ Document approved by the Regional Committee on 22 March 2006 (deliberazione n. 130).

¹⁰⁶ Isfol, *Le azioni locali a supporto del prolungamento della vita attiva*, op. cit., p. 126-129.

¹⁰⁷ Ibidem, p. 130-132

28 September 2006 “The labour market in Lombardy” (*“Il mercato del lavoro in Lombardia”*) foresees the realisation of those actions able to guarantee the activity of workers, and in particular of those over 45. Active ageing is a priority in the ROP 2007-2012 (Objective 2) and therefore the Region affirms its commitment to: guarantee funding for lifelong learning and up-skilling initiatives; improve access to lifelong learning for older people; encourage active ageing; extend working life; increase older people’s participation in to the labour market; implement active ageing policies; dissemination of good practices related to lifelong learning. Moreover, one of the two intervention’s system of the Region is “*Dote Formazione*”, a set of resources addressed to skills and knowledge development (¹⁰⁸).

Marche

In its Preliminary Regional Strategic Document (*Documento Strategico Regionale Preliminare*), the Region includes, among its employment priorities, the implementation of actions that enable employment outplacement (such as training, subsidies ect.) and, in order to guarantee a better training offer, it foresees the strengthening of the “Centres for Adult Education” (*Centri per l’Educazione degli Adulti – EDA*). In line with the POR’s priorities, the Region activated a close collaboration with Bilateral Funds to finance lifelong learning and training for those disadvantaged workers, and in particular those over 45 (¹⁰⁹).

Molise

In this region, only the ROP 2007-2013 (under the objective “Regional competitiveness and employment”) deals with active ageing. More precisely, this document refers to the necessity of maintain the skills of the older workforce, and make better use of it (¹¹⁰).

Piedmont

The ROP 2007-2013 (under the objective “Regional competitiveness and employment”) underlines the necessity of implementing active ageing projects in order to react to the economic and labour market dynamics through – among the others – training initiatives.

In 2011, in the Province of Turin the training body of API (*Associazione Piccole e Medie Imprese di Torino e Provincia*) – the Association for small and medium enterprises of Turin and Province, adhering to CONFAPI (*The Italian Confederation for Small and Medium Industry*), namely API Formazione launched a project called “Over 50 in SMEs: promoting older workers” (*“Gli Over 50 nelle PMI: una risorsa da valorizzare”*). This project aimed at promoting the development of those collaborators over 50 by inducing small and medium enterprises to retain them and their seniority, and to transfer their knowledge to the younger workforce. In this perspective, the project elaborated an intervention model focused on lifelong learning, counselling in the workplace, age discrimination, and ergonomics (¹¹¹).

Puglia

In the field of active ageing, it is possible to mention the Implementing Regulation of the Regional Act. N. 19/2004 on regional incentives for employment and training (*“Procedura per l’ammissibilità ed erogazione di incentivi costituenti regime regionale di aiuto nel campo dell’occupazione e della formazione nell’ambito POR Puglia FSE 2007/2013”*) regulating incentives to provide training and hire disadvantaged people, such as those over 50. The 2007-2013 ROP’s strategic objectives give also particular attention to older workers. At provincial level, one of the most active Provinces in the field of active ageing is Brindisi, which published three calls for

¹⁰⁸ Ibidem, p. 134-135.

¹⁰⁹ Ibidem, p. 134-137.

¹¹⁰ Ibidem, p. 137.

¹¹¹ For further information see: API Torino and Camera di Commercio, Industria Artigianato e Agricoltura di Torino, *Gli Over 50 nelle PMI: una risorsa da valorizzare*, July 2011.

funding initiatives in the field of: incentives to provide training for unemployed people over 45 ⁽¹¹²⁾, work experiences ⁽¹¹³⁾ and lifelong learning ⁽¹¹⁴⁾. Furthermore, in 2009, the Province of Brindisi adopted a specific plan for training policies (*Piano di attuazione delle politiche formative*) which gives particular attention to older workers. In line with the European objectives, the ROP foresees several actions addressed to the older population such as counselling and mentoring. At regional level, it is also worth mentioning the call *Watching the future* through which the Region financed training courses and activities for skills development and updating ⁽¹¹⁵⁾.

Sardinia

In this region, the participation rate of older workers is particularly low. Therefore, promoting their employability is a core issue at both regional and provincial level. Most of the funded interventions are training activities and initiatives that improve the match between labour supply and demand. In particular, the Regional Act n.1 adopted on 14th May 2009 on training dispositions (*Disposizioni per la formazione del bilancio annuale pluriennale della Regione*) identified some training interventions for those workers - aged over 40 - that remained excluded from the labour market ⁽¹¹⁶⁾.

Sicily

Only in the last years, Sicily started to pay attention to active ageing issues. In 2009, the Region published only two notices for implementing work experience and vocational training activities for older workers (over 50). Under the second Axis of the ROP, the Regions committed itself in providing training activities and skills development programs for disadvantaged people, such as older workers ⁽¹¹⁷⁾.

Tuscany

Several documents deal with active aging in the Tuscany Region – such as the Regional Strategic Planning Document 2007-2013 and the ROP 2007-2013. In the field of training opportunities for older workers, several initiatives have been identified, and in particular the specific notices for skills development and updating published by the Provinces of Massa Carrara, Grosseto and Florence. Moreover, the Province of Livorno sustains personalized training courses for unemployed people aged over 45, while the Province of Prato focused on work experience initiative for those over 40. The latter Province is probably more famous for the project PROF (*Percorsi di Rinconversione professionale per Operatori Familiari*), a training initiative aimed at retraining 15 unemployed people over 45 for the specific profession of “family worker” ⁽¹¹⁸⁾.

The Autonomous Province of Trento

In accordance to the ESF 2007-2013's targets, in 2008 the Autonomous Province of Trento launched a set of training opportunities with the aim of raising the participation rates of older people and reducing age discrimination phenomena. The Province identified five thematic areas for its training interventions, which are free thanks to the State and ESF's financial contributions. The citizens of the Province of Trento aged over 50 can access to the following training opportunities: 1) digital literacy; 2) professional skills development and updating; 3) skills valorisation and development in the field of foreign languages; 4) knowledge valorisation and transfer; 5) transversal skills development. The Autonomous Province of Trento is one of the most active Provinces in the field of active ageing and lifelong learning for older workers ⁽¹¹⁹⁾.

¹¹² Avviso Pubblico PROV-BR 2/2009 bonus assunzionale una tantum alle imprese.

¹¹³ Avviso Pubblico PROV-BR 7/2009 multiazioni attività formative.

¹¹⁴ Avviso Pubblico PROV-BR 1/2009 formazione continua occupati (just in time).

¹¹⁵ Isfol, *Le azioni locali a supporto del prolungamento della vita attiva*, op. cit., p. 144.

¹¹⁶ Ibidem, p. 145-147.

¹¹⁷ Ibidem, p. 148-149.

¹¹⁸ Ibidem, p. 149-152.

¹¹⁹ For more information, please visit:

Umbria

In Umbria the condition of older workers raises some concerns. Indeed, this target group is among the 2007-2013 ROP's initiatives. Under this plan, the call "*LavorOver 45*" (2007) promoted training projects for adults and projects intended to develop and upgrade older workers' skills. One of the most active Province is Perugia which, indeed, in addition to the definition of its Program for labour, training and education policies ("*Programma ed indirizzi per le politiche del lavoro, della formazione e dell'istruzione*") has also activated a specific notice for adult learning projects (¹²⁰).

Veneto

Both the Region and the Provinces have intervened in support of older workers. In the Strategic Preliminary Document of the Region, particular attention has been paid to counselling and training policies for people aged 55-64, in particular those low skilled. This necessity is further stressed in the ROP in which the Region commits itself in increasing the participation rate of older workers to training and updating courses, and carrying out adult learning projects (¹²¹).

The role of Employment Services in training opportunities for older workers

For what lifelong learning concerns, the Employment Services (*Servizi per l'impiego*) give particular attention to older workers' needs by promoting lifelong learning as the main lever for workers' integration into the labour market. This promotion is carried out through a close collaboration between the Employment Services and those authorized training agencies and centres dislocated in the territory. For instance, in 2008 the Province of Rome, on the basis of the information received by the Employment Centre (*Centro per l'impiego*) published a call on training for unemployed workers ("*Avviso Pubblico B Formazione Lavoratori disoccupati e inoccupati 2008-2010*") in order to fund a set of training services aimed at promoting the labour market integration of those disadvantaged groups, such as older workers (over 50) and in particular those unemployed or in mobility (¹²²). One year later, in line with the POR 2007-2017, the Province of Rome launched the project addressed to the disadvantaged group and people over 40 ("*Progetto Obiettivo Over 40 e Fasce Deboli*"), which covered training courses, income benefits and other employment measures (¹²³). In the Lazio Region it is worth also mentioning the collaboration between the Employment Services and Counselling Services of the Municipality of Rome, which is at the core of the project "*Città dei Mestieri*", which is an information and counselling centre addressed to those managers over 50 that remained unemployed during the economic crisis and that are interested in reorganizing their career. Similarly, in Umbria, the Employment Services of the Province of Perugia have been involved in the promotion of two initiatives aimed at the development of lifelong learning initiatives, namely:

- project *Astra*: This project foresees a set of training courses addressed to the citizens aged 25-64 for the development of basic skills (computer science and languages), technical skills (tourism sector) or transversal skills (marketing, entrepreneurship, health and safety) aimed at a better integration into the labour market;
- project *VitaAttiva*: This projects is addressed to those citizens aged 25-64 living in the Province of Perugia and interested in updating their knowledge and skills. For them there

http://www.fse.provincia.tn.it/Trento_nuova_grafica/download/corsiFSE/2008/guida_over50.pdf (Last accessed: 22 March 2012).

¹²⁰ Isfol, *Le azioni locali a supporto del prolungamento della vita attiva*, op. cit., p. 156 ss.

¹²¹ Ibidem, p. 163.

¹²² Ibidem, p. 109.

¹²³ Dipartimento III della Provincia di Roma, *PROGETTO OBIETTIVO. Formazione, misure di sostegno al reddito, interventi integrati per l'occupazione e l'inclusione, rivolti a lavoratrici/lavoratori con più di 40 anni a soggetti appartenenti alle fasce deboli POR LAZIO 2007/2013 - Asse I, II, III*.

are 24 available courses (such as computer science, foreign languages, communication ect.).

In the Emilia-Romagna Region, the Province of Ferrara has realized the project “*OverForti Formazione per l’occupabilità, il reinserimento, la transizione e l’inclusione*” with the aim of providing training and labour inclusion’s opportunities through the creation of a virtuous circle between vocational training and counselling services. *OverForti* is based on the provision of training courses (such as in mechanics and accountancy) and on the introduction of internship periods for unemployed people over 40. In the Province of Modena the Employment Services have been involved in the project “*Frida-Fomazione per ricominciare da adulti*” which promotes lifelong learning for a wide range of subjects, including people over 45. This initiative is based on the implementation of a wide territorial network of employment, training, and counselling services. It aims at analysing the training needs expressed by those people at risk of exclusion from the labour market, and planning an *ad hoc* training supply (¹²⁴).

Also in the Veneto Region, the close collaboration between the Employment Services and the training agencies has played a key role for active ageing initiatives. An example is given by the project “*Cittadinanza Professionale*” realized by the Province of Verona to promote a longer working life for unemployed people over 45 enrolled at the Employment Centres, who have difficulties to access to the labour market due to their age or lack of skills. For this target group, the projects provided specific internships’ possibilities and counselling and training services (¹²⁵). In the Province of Venice, the collaboration between public and private Employment Services, on the one side, and the training and counselling agencies, on the other side, has been very important for the realization of the “*Talentaged*” Project, which supports a longer working life for people over 45 and tries to help unemployed to access to the labour market. The main objective of this project is to enable those people over 45 to stay active in the labour market by better appreciating their experience and potential (¹²⁶).

Box 1: Training opportunities in the framework of safety net measures and employment subsidies: Welfare to work

Italy is currently dealing with a difficult employment crisis, which has induced the Ministry of Labour, Health and Social Policies, and in particular the DG for Safety Net Measures and Employment Subsidies, to realize a complex and articulated political action able to integrate and develop all measures tackling the crisis, and to create a synergy among the actors who intervene in the labour market at territorial or national level. This is a New National Intervention Plan – *Azione di Sistema di Welfare to Work per le politiche di reimpiego* (¹²⁷)– lasting three years (2009-2011) with the aim of introducing welfare to work policies and services with regard to those workers excluded – or at risk of exclusion – from the labour market. This intervention, implemented by the Ministry of Labour, Health and Social Policies with the technical assistance of Italia Lavoro S.p.A., and in synergy with the Italian Regions and Autonomous Provinces concerned, is a follow up of Programs PARI and PARI 2007.

Interventions planned at territorial level aim at:

¹²⁴ More information on the project are available at the following link:
<http://www.frida.provincia.modena.it/page.asp?IDCategoria=95> (Last accessed on: 27 March 2012).

¹²⁵ More information on the project can be found at the following link:
[http://www.j4u.provincia.vr.it/Sezione.jsp?titolo=Progetti%20finanziati%20per%20la%20Linea%20di%20Intervento%202%20-%20Azioni%20per%20favorire%20l'occupazione%20di%20over%2045,%20donne%20e%20migranti"&idSezione=1640](http://www.j4u.provincia.vr.it/Sezione.jsp?titolo=Progetti%20finanziati%20per%20la%20Linea%20di%20Intervento%202%20-%20Azioni%20per%20favorire%20l'occupazione%20di%20over%2045,%20donne%20e%20migranti) (Last accessed on: 27 March 2012).

¹²⁶ For further information see: <http://www.progettagroup.com/TALENTAGED/index.htm>.

¹²⁷ For more information visit:
http://www.lavoro.gov.it/Lavoro/md/AreaLavoro/AmmortizzatoriSociali/Incentivazione_Reinserimento/Welfare+to+Work.htm

- Creating and consolidating technical assistance's permanent structures in support of the Ministry of Labour, Health and Social Policies, Regions, Provinces and Employment Services;
- Developing and consolidating the national and regional governance for a better coordination among the actors and integration of economic resources;
- Making available information to plan, manage and provide services, in order to reduce the length of exclusion's periods from the labour market;
- Guaranteeing the presence of an efficient and decentralized network of public and private employment services;

The interventions are funded by a combination of financial resources: PON (ESF) 2007/2013 Funds; resources of the National Fund for Employment and the Rotation Fund (*Fondo Nazionale per l'Occupazione e Fondo di Rotazione*); regional resources for PORs FSE, and other available communitarian, national and local funds. The Action is addressed, among the others, to 25 thousand workers not receiving any kind of unemployment or mobility benefits, a group that includes over 50 too. Among the special actions implemented in the framework of the New National Intervention Plan it is worth mentioning here the "Re-placement Action" addressed to Ex-Executives over 50, who now result to be unemployed (¹²⁸). Through this Action, the Ministry of Labour, Health and Social Policies has financed those actions aiming at replace the unemployed Ex-Executives over 50 though hiring benefits (¹²⁹).

1.2. Achievements and challenges ahead

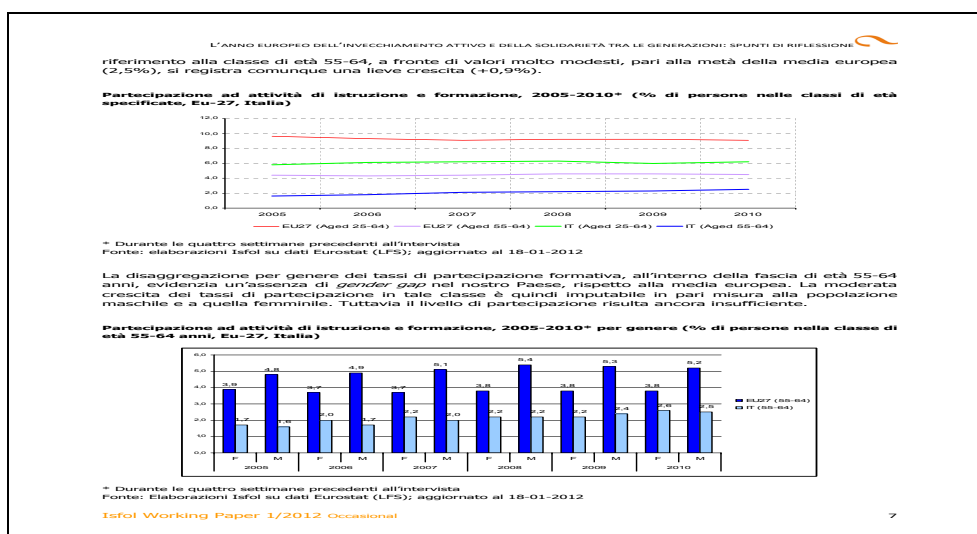
Coherently with the European Employment Strategy, Italy has recognized lifelong learning as a strategic response to crisis challenges: by equipping workers with the right skills, it enhances employability chances, especially for older workers. However, the EU-27 lifelong learning participation rate did not reach the Lisbon benchmark (12.5%): in 2010 only 9.1% of adult population in the EU participated to lifelong learning activities. The lifelong learning participation rate of people aged 55-64 is even lower: 4.5%. Yet, progress is still slow in many countries, including Italy, where, in 2010, only 6.2% of the working population (25-65 years old) and 2.5% of people aged 55-65 were involved in education and training activities (¹³⁰). These data collocate Italy among the last ranks of the EU-27 countries (see Eurostat, *Adult Education Survey*, 2007).

¹²⁸ Azione di ricollocazione rivolta agli ex Dirigenti over 50 in stato di disoccupazione.

¹²⁹ For further information see *Avviso pubblico a sportello rivolto ai datori di lavoro per la richiesta di contributi finalizzati al reinserimento lavorativo*, available at: <http://www.lavoro.gov.it/NR/rdonlyres/085EC800-FB38-4C4A-BACC-E72A6C078C29/0/WTWDirgentiover50.pdf>

¹³⁰ Isfol, *L'anno europeo dell'invecchiamento attivo e della solidarietà tra le generazioni: spunti di riflessione*, Isfol Working Paper n.2012/1, March 2012, p. 7.

Graph 1: Rates of education and training activities' participation by age, 2005-2010, EU-27, Italy⁽¹³¹⁾



Taking into consideration the age dimension, it is possible to observe that the youngest groups (15-54) have higher participation rates compared to that recorded by the oldest one (54-65). Age differences are more pronounced when the employment situation is taken into consideration. As reported by the following table (Table n. 3), among the employed population, the group aged 35-54 participates more into education and training activities (with women participating more than men). This seems to confirm that the key factor enabling participation into education and training activities is the employment condition: the higher incidence of inactive people among the older population (over 54) appears to be the main cause of training inactivity. On the contrary, prospects for career progression and other professional reasons are the main driver for taking part in lifelong learning activities. However, taking into consideration Isfol data on workers and companies involved in training activities financed by the bilateral training funds⁽¹³²⁾ (see Graph. 2), the age group that participate more in these funded training activities is the one aged 35-44, while older workers participate only by 5,5%.

Table 3: Rates of education and training activities' participation by age, gender and employment condition, 2009⁽¹³³⁾

Age	Gender	Employed people (%)	People looking for a job (%)	Inactive people (%)	Total (%)
15-24	M	3.3	4.0	4.8	4.3
	F	5.0	4.3	4.8	4.8
25-34	M	3.5	2.9	3.5	3.4
	F	5.0	5.2	2.1	4.0
54-44	M	4.0	2.0	1.1	3.7
	F	5.5	2.9	1.2	4.0
45-54	M	3.7	0.9	0.7	3.3

¹³¹ Isfol data (Isfol, *op.cit.*, p. 7) on Eurostat data (LFS) (Last accessed: 18 January 2012).

¹³² Isfol data refer to 4.200 Training Plans (Piani Formativi) concluded between January 2008 and June 2010 (Isfol, *Rapporto annuale sulla formazione continua 2012*, 2011, p. 72).

¹³³ Isfol, *Rapporto sulla formazione continua 2010*, 2011, p. 21. Isfol's elaboration data on Istat data.

	F	5.9	2.4	1.1	3.9
55-64	M	3.4	0.6	0.9	2.1
	F	4.8	0.4	1.5	2.3
<i>Total</i>		4.4	3.2	2.4	3.6

Graph 2: Employees involved in training activities funded by the bilateral training funds, by age⁽¹³⁴⁾

Tabella 3.24 - Tipologia dei Progetti costituenti i Piani (val. %) - dati in approvazione

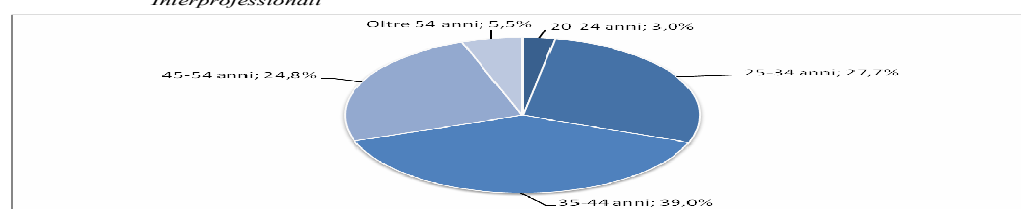
Tipologia del progetto/intervento	Progetti costituenti i piani
Integrato con attività di accompagnamento alla mobilità/outplacement/ricollocazione	0,5
Integrato con attività di bilancio delle competenze	5,0
Integrato con attività di orientamento	5,6
Integrato con attività di sostegno per particolari tipologie di utenza	0,0
Standard (solo formazione)	88,9
Totale	100,0

Fonte: Elaborazioni ISFOL - Area Politiche e Offerte per la Formazione Continua - su dati del Sistema permanente di monitoraggio delle attività finanziate dai FPI.

3.3.2 - Le caratteristiche dei lavoratori e delle imprese coinvolte²²

La partecipazione è sostanzialmente bilanciata tra le classi d'età centrali con una prevalenza degli appartenenti alla classe 35-44 anni. Ancora scarsa è invece la partecipazione dei lavoratori più giovani e di quelli più anziani.

Grafico 3.2 - Età dei lavoratori coinvolti nella formazione finanziata dai Fondi Paritetici Interprofessionali



Fonte: Elaborazioni ISFOL - Area Politiche e Offerte per la Formazione Continua - su dati del Sistema permanente di monitoraggio delle attività finanziate dai FPI.

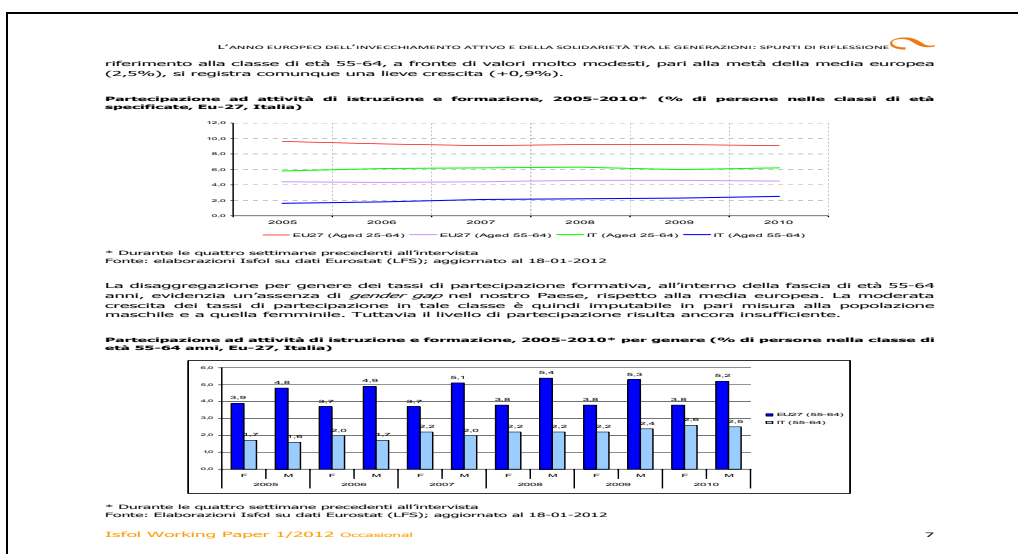
Per quanto riguarda il livello di istruzione si evidenzia una forte componente di lavoratori con titolo di studio medio o elevato (diplomati e laureati rappresentano circa la metà dei beneficiari). Non trascurabile la partecipazione dei lavoratori con basso titolo di studio, mediamente più alta rispetto a quanto riscontrato in altre analisi e rilevazioni in materia.

²² I dati sulle caratteristiche dei partecipanti (lavoratori e imprese) si riferiscono ai circa 4.200 Piani formativi conclusi tra il gennaio 2008 il giugno 2010.

Despite the low levels of participation in lifelong learning activities of older workers, gender disaggregated data regarding lifelong learning participation rates of people aged 55-64 show a lack of gender gap in Italy compared to the European average, as illustrated by the following graph.

¹³⁴ Isfol, *Rapporto sulla formazione continua 2010, 2011*, p. 72.

Graph 3: Lifelong learning participation rates of people aged 55-64 by gender, 2005-2010, EU-27, Italy ⁽¹³⁵⁾



For what territorial distribution concerns, lifelong learning participation rates are very low in South Italy (*Mezzogiorno*) while in the North/North-East of the country, and in particular among employed people, they are higher. The lack of sufficient and proper training opportunities offered by the companies located in the South Italy is perceived as the main cause of this disparity in the country.

Table 4: Training course participation rates of people aged 15-64 years old by geographical area, 2009 ⁽¹³⁶⁾

Employment condition	Reasons for taking part into a lifelong learning activity	North-West	North-East	Centre	South	Italy
Employed people	Professional reasons	3.6%	4.1%	3.4%	2.1%	3.2%
	Personal reasons	1.4%	1.4%	1.3%	0.5%	1.1%
	Lack of training	95.1%	94.5%	95.3%	97.4%	95.6%
People looking for a job	Professional reasons	1.6%	2.2%	2.0%	1.4%	1.6%
	Personal reasons	1.6%	2.9%	1.7%	1.0%	1.5%
	Lack of training	96.8%	94.9%	96.4%	97.6%	96.8%
Inactive	Professional	0.6%	0.7%	0.9%	0.6%	0.7%

¹³⁵ Isfol data (Isfol, *op.cit.*, p. 7) on Eurostat data (LFS) (Last accessed: 18 January 2012).

¹³⁶ Isfol, *Rapporto sulla formazione continua 2010*, *op. cit.*, p. 21. Isfol's elaboration data on Istat data.

people	reasons					
	Personal reasons	2.4%	2.6%	2.5%	0.9%	1.7%
	Lack of training	97.1%	96.7%	96.6%	98.5%	97.6%

1. 3. Activities at company level to retain older workers

At national level, innovative models of knowledge sharing, such as the creation of “company-schools” for sharing competences and skills, involving over 45 workers and the young generation, have been identified. A significant example of training activities to retain older workers in the workplace is given by the first company case “Flexibly Beyond”, which will be illustrated by *Politecnico Calzaturiero* from the Veneto Region during this Second Session of the Seminar.

2. Health and wellbeing

2.1. Specific initiatives to promote health and wellbeing in companies

Italian companies constantly promote initiatives going beyond legal obligations, which are aimed at improving the quality of the working environment and of work itself.

This commitment by companies is either developed through one-sided initiatives, undertaken by the management of the single company, or through bipartite initiatives (this is the case of agreements executed by companies and trade unions). All these initiatives play an important social and economic role in the wider welfare system run by the State.

One-sided initiatives, undertaken by single companies

There are several examples of actions and initiatives being undertaken by single companies in this field, among which the following can be mentioned:

- 1) Reconciliation of working and family life (e.g. establishment of kinder-gardens, flexibility in working time arrangements, services to persons);
- 2) Measures aimed at improving the working environment (e.g. fitness-centers within the company);
- 3) Services of preventive and diagnostic medicine for employees;
- 4) Transport benefits;
- 5) Individual shopping card;
- 6) Summer campus for employees' kids.

Measures aimed at promoting health and wellbeing in companies can be implemented at company level or through bipartite agreements (undersigned between company and trade unions).

Apart from the great variety of actions that can be promoted at single company level – see above – companies and trade unions very often agree the establishment of complementary health plans for the employees.

To this regard, the Italian legislative provisions (Financial Law 2008 and two other Ministerial Decrees issued in 2008 and in 2009) have confirmed the central role played by the industrial relations in the establishment of complementary health plans, meanwhile regulating the tax regime applicable to the plans.

So, as from 2008, complementary health plans in Italy have recorded a significant development in the national entrepreneurial system, and have presently acquired great importance from both the economic and health aspect. In this context, Confindustria has had a central role for its establishment and development.

The establishment of complementary health plans in the industrial sector is, in some cases, promoted by national collective agreements. In other cases, these are the results of bipartite agreements executed at company level between the company and the trade unions.

Examples of complementary health plans established by national collective agreements can be found in various industrial sectors: Food, Chemicals- Pharmaceuticals, Energy, Gaz-Water-Oil.

At company level, there are several examples of bipartite agreements between company and trade unions, e.g. in sectors such as: TLC, IBM, Car Industry, and Energy-Oil.

The funding of these schemes derives from contributions paid partly by the company and partly by the employee.

The variety of services provided to the employees through complementary health plans operating in the industrial sectors is quite wide, and can be resumed as follows, just to mention some examples: hospitalization, surgery operations, long-term assistance, dental care, diagnostic controls, sunglasses and lenses reimbursements, home-based medical assistance, physical therapy, check-ups, etc. Furthermore, benefits may consist in reimbursing fees paid by the employee for diagnosis and

medical services provided by other subjects (the National Health Care Service or other private providers).

These measures are generally applied to all workers employed in the company, not to specific groups of employees.

Benefits deriving from the activation of complementary health plans are generally applied to all categories of employees: workmen, cadres and managers, in some cases also to pensioners. In many cases the management of complementary health plans is entrusted to external bodies such as the main insurance companies operating in the market.

As regards the measures adopted unilaterally by the company, some actions may, indeed, involve a positive impact specifically on older workers' health (e.g. preventive and/or diagnostic medicine, fitness activities, ergonomic solutions at work).

But also complementary health plans may produce benefits for older people, as they often provide medical care services also to pensioners.

In some cases these measures are temporary, in some others they are structural: there is no fixed rule as regards their duration. For example, some measures provided by complementary health plans are temporary, in the sense that the single plan provides an expiration date, but the plan can later be renewed with a subsequent agreement. As regards the measures adopted at single company level, with one-sided decision, these are generally structural measures, circumstance that does not exclude the possibility of temporary provisions in certain cases.

2.2. Social partners' involvement in formulating these measures

As explained above, there are different levels of involvement for the establishment of these measures:

- 1) Single company level, so one-sided initiatives, as a result of decisions undertaken by the company's management.
- 2) Bipartite promotion, through agreements between companies and trade unions. This may occur through national collective agreements or through agreements with the unions at company level.

The State has no direct role in the management of these health plans. A national intervention is limited to the relevant legislative provision enacted in 2008. Organizations were involved at various levels, but Confindustria played a central role in the promotion of these plans.

2.3. Measures to promote older workers' health: achievements and challenges ahead

The measures described above, both deriving from one-sided initiatives (companies) and by complementary health plans do involve a positive impact on older workers' health.

As regards the companies' single initiatives on this field, it is true that, as a general rule, this kind of measures can be more easily adopted by big-sized companies, which traditionally have the availability of wider budgets and of a higher level of internal organization. Nonetheless, there are many positive experiences also by SMEs, which represent the great majority of our industrial system.

Benefits deriving from complementary health plans are very well assessed by the benefited workers/pensioners and play a very significant role in efficiently integrating the services offered by the public Welfare system to the whole population (granting a universal system of protection to all citizens).

2.4. Examples of actions taken to develop health management strategies at company level

Welfare Plan – adopted by a big company located in North-Eastern Italy, employing 62.000 workers worldwide, globally active – Sector: production and distribution of luxury/sport articles.

The Welfare Plan provided by this company to all employees and their family members, includes non-monetary benefits, such as medical care. This refers to dental care, to specialist medical treatments, to high-level diagnostics and big surgery interventions. A green number has also been activated for the employees, calling which they can collect all kind of information regarding the medical assistance, which they are entitled to.

The Welfare Plan is the result of an agreement executed between the company and the trade unions. This company has also received an important award for its actions in the Health/Wellness field, dedicated to employees and their families.

With this Plan, the company's employees keep their entitlement to all the medical care services ensured by the National health care system, but they can add to these - or replace them with - the medical assistance guaranteed by the company's Welfare Plan, in order to avoid possible waiting lists generally existing in the Public Health Service.

This company is not directly managing the Welfare Plan, but has delegated it to a broker specialized in the management of health care policies.

2.5. Additional comments on the theme “Health and wellbeing”

The ageing of the workforce involves, indeed, important consequences that must be taken into account also by companies. Nevertheless, it is important to make some distinctions.

On one hand, we must take into account the health problems linked to the age and not to the working activity, for which the whole society must be held liable. In this case (1) there is an important role to be played by national policies (role of the State). To this regard, it is necessary to promote a cultural change in people's mindset, in order to give priority to health prevention rather than to effective medical care. This cultural change must give priority to healthy lifestyles, to a healthier nutrition, to a greater physical exercise as well as to a more active monitoring on the individual's health conditions. Such an approach, which should be developed also through specific training programs promoted in schools, would certainly contribute, on one side, to create the basis for a “healthy ageing” and, on the other, to limit the social/public expenses for the treatment of certain pathologies linked to ageing.

On the other hand (2), companies can undoubtedly adopt initiatives on aspects, which are directly linked, to their employees' working activity and to the working environment.

We are, of course, well aware of the difficulty in clearly distinguishing between health problems linked to the working activity and those linked to the ageing of workers.

But this circumstance must certainly not involve new and onerous burdens on companies.

This is an issue, which can be only partially addressed by companies. Companies can, indeed, play a role - for example - by supervising health aspects and by ensuring consistency between working activities and risks existing in the company (ergonomics and reduction of tasks could be a solution, where possible).

An important role should also be played by an adequate pension system: a system which should be able to steer public resources towards the creation of new jobs, providing transition and coaching mechanisms, in order to exploit the precious experience of older workers.

Such a system should reduce the older worker's traditional working activities and address his/her new role to the transfer of know-how towards younger professionals, who could finally be recruited by the company and be supported by the older worker, in order to acquire precious information and an adequate education on-the-job.

3. Adequate work organisation

3.1. Survey of Italian legislation concerning incentives to keep older workers at workplace or in the labour market

Although the assignment for this session of the seminar focuses on working conditions (flexible working arrangements, working time flexibility, autonomy and variety of tasks) it might be considered unsatisfactory to illustrate a report lacking of information on how older workers actually stay in the labour market around the legal age of retirement and on the measures Italian Government has taken in these last years concerning job security for senior workers. In other words, there will be no arrangements in working conditions if there isn't any work to arrange: and the upper age sector of workers is the first class at a risk when a labour market crisis occurs. The main reason stands in the relatively higher labour cost of older workers, rather than their supposed lower performance. So, we think at "actions aimed at keeping older workers in employment" mainly as actions aimed at fighting the phenomenon of exit of older workers from the labour market rather than adapting work conditions to the changing complex of abilities workers take as the age increases. More, when we speak of "actions" in the following lines we mean measures that affect labour market organization, rather than work organization into single companies, and when we speak of "aim" we mean the attempts made in the direction of reducing labour cost borne by companies or, else, making worthwhile for older workers the choice of staying rather than that of accepting economic incentives to resign.

It is our belief that these dynamics do work everywhere, in Europe. But in this context we can only provide a short survey of Italian legislation concerning incentives to keep older workers in the workplace or in the labour market and try and draw some conclusions from the facts' sequence.

In assessing main achievements - and failures - of these incentives it is not possible to skip a look on three aspects of the matter:

- firstly, in general, the legal framework on labour relations;
- secondly, under a "sociological" point of view, the trend of expulsion of older workers from labour market as soon as they reach the conditions to retire before the legal age;
- thirdly, on the field of Italian chronicle of the past 40 years, from first oil crisis to current financial crisis, the actual conditions of older workers in mass dismissals that occurred mainly in the industrial sector and also in third sector. We intend to refer to the whole body of law Acts that were made to allow early retirement in case of economic sector or single company crisis as a sort of social safety nets. During a long period of time, there hasn't been any space for keeping older workers in employment, as the incentives were aimed, by law, to increase older workers' spontaneous resignations.

Keeping at hand these three aspects can help in understanding some peculiarities of the present Italian situation.

A common characteristic of those, among the attempts made to keeping older workers at work, that were successful, to a degree, is the attention paid to the immediate advantage of the employee, rather than that of the employer. And among the different kinds of advantage, it seems that the attempts that provided some immediate economic advantage for the worker had some chance more than those shaped to increase the yield on future rent of the work years after the reaching of the conditions to retire. In other words, reducing labour cost was less effective than increasing wages, as we are going to see.

Another peculiarity of Italian situation, perhaps the most evident, it is the heaviness of the measures taken by Italian Government in the line of pensions, especially in increasing the legal age of retirement to a nearly unbearable extent. That might have been avoided if the pension system hadn't been burdened in the recent past with duties that should have been done by different sector of welfare.

Age and employment: legal regulation

The law that rules nowadays all the aspects of individual dismissals (not the collective ones due to economic or crisis causes, that are subject to a different regulation) has been in force since 1966 (¹³⁷).

In particular, the first paragraph of the law allows dismissals as a consequence of a limited number of causes that are strictly defined. These limitations aren't applied to workers that are aged 65 or more (¹³⁸) and that are able to get retired, owing all the condition time by time required.

Therefore, on this side of that age, protection works on a 30 years old worker as well as on a 60 one. Although it isn't a measure aimed directly at older workers, it is considered in this context because it sets a crest between two ages: speaking of retaining older workers at workplace has a different meaning for 65 or for a 66 years old worker. That limit can be pushed forward or linked to a variable index, as the calculated life expectancy, it can even be disconnected from legal age or retirement, still marking the point beyond which all the protections of the workplace cease.

This is what happened right now that Italian Government, setting a higher and increasing legal age of retirement, fixed at the age of 70 (far beyond any legal age expected for the next 20 years) the ceasing of the protection against illegitimate dismissal. This new measure (¹³⁹) doesn't modify the law just mentioned before, but refers to the art. 18 of the Workers' Statute, that rules the consequences of a dismissal once that it has been recognized as illegitimate. These consequences are today under maintenance, with great evidence in Italian political debate; the value that the protection until 70 will have, it depends upon the aspect that art. 18 is going to assume at the end of the Parliamentary procedure. Anyway, this new measure is strictly bound to another, in the same part of the new law: the setting of a series of coefficients to be used in calculation of the amount of pension per each year of contribution after the current legal age until the age of 70 (¹⁴⁰).

Exit from employment before legal age

In the last 25 years of last century, in Italy the social phenomenon of leaving one's job before legal age, as soon as the alternative conditions to retire are reached, has been increasing to a considerable degree.

Until it was possible to retire regardless to age and owing at least only 35 annual contributions, the so called *seniority pension* ("pensione di anzianità" in this case different from *old age pension*, "pensioni di vecchiaia") has been used as the most popular social safety nets, when necessary in consequence of corporate or sector restructuring or crisis, besides the law incentives to early retirement or as a substitute of them when in lack of the conditions required. Very often, workers' inclination to leave the job for retiring would be encouraged with offering a (more or less) golden handshake besides the statutory severance pay; the offer employers make can be bargained by trade-unions present in the company, even making use of statutory arbitration procedures.

The improper use of seniority pension as a social security cushion has gone on after 1995, when for the first time a certain age was needed to get seniority pension too, and until now, when conditions required for seniority and old age pensions have become nearly the same (¹⁴¹) evidently, gaining any period, even a short one, before legal age (and, in a not far future, before the age of 70) is still worthwhile for Italian employers. So much so that, in more recent years, workers agree to resign even before reaching any condition to retire, and part of the lump sum that they get from employer

¹³⁷ Legge 15.07.1966, n. 604, "Norme sui licenziamenti individuali". Furthermore, L 11.08.1990, n. 108, "Disciplina dei licenziamenti individuali"

¹³⁸ In article 11 of the same Law.

¹³⁹ Art. 24, comma 4, last sentence, DL 201/2011 converted into L 214/2011

¹⁴⁰ This measure is in the same article n° 24, 4° comma, of the mentioned law and this is how it's written: "The prosecution of work activity is encouraged..... by the effect of coefficients set until the age of 70."

¹⁴¹ In force of the Law 8.8.1995, n. 335, "Riforma del sistema pensionistico obbligatorio e complementare", for the seniority pension, besides the minimum contribution of 35 years the age of 52 is required, bound to reach 57 in about 10 years. Or else, the seniority pension can be acquired regardless to age with a minimum of 40 years of contribution.

in addition to severance pay is assigned to cover the cost of the missing contributions.

Statutory incentives to early retirement

Until 1968, “Cassa Integrazione Guadagni” has been the main kind of protection of workers (and employers) from temporary state of crisis in companies as well as in whole economic sectors. The CIG is a financial fund supplied by employers’ and State’s contributions whose purpose is to pay an indemnity in compensation of loss of wage resulting from reducing work hours or temporary ceasing work due to circumstances beyond our control (i.e., in agriculture, acts of God). An improved version of the fund, the CIGS, worked in case of crisis or restructuring of companies or of whole economic sectors: in this case, the indemnity could reach levels comparable with the suspended wage. In both cases, intervention of CIG implies an existing employment, whilst after the ceasing of it the only indemnity then existing, the unemployment compensation (DS as “disoccupazione”), couldn’t be considered as its amount was of trifling value.

In 1968 a new law (¹⁴²) sets the amount of unemployment compensation out to match the lost wage for a number of months, only in industry and only if specific circumstances caused the severance of the work: again, crisis or restructuring. The same law brought into use the first kind of early retirement known in Italy: a sum, equal to minimum pension, paid to senior workers that have lost their job in consequence of one or more of the causes provided for by law, if minimum conditions of age and contribution are accomplished, until the statutory conditions for retiring have been reached.

Only in 1981 the early retirement starts in its “classic” way (¹⁴³): a regular pension, not more than 5 years before the limit (alternatively that for seniority or old age pension), whose amount is calculated as if the missing contribution was paid instead. It must be considered that, at that time, legal age of retirement was 60 for men and 55 for women, so that people aged down to 50 could pass directly from wage to rent, in case of collective dismissal, without intermediate periods of CIG nor DS. Another aspect, a claim was required within a deadline: it means that the early retirement of that kind, provided by the State for the workers, was an alternative to waiting for the dismissal and therefore beginning the long course of unemployment (getting indemnity for the first months and looking for another job): in this case we are dealing with a “voluntary” as well as a definitive withdrawal from labour market.

So much so, that the possible earning from a new job entailed the reduction of the early pension for an equal amount until the legal age had been reached; by that moment, the reduction became partial. That law was meant as well for blue and white collars in case of dismissal from big companies in the industrial sector, but for building subsector. Henceforth, the same shape (barred some small differences) was adopted in a number of other sectors:

- publishing industry (1981; 3 years anticipation for seniority and 2 for old age pension) (¹⁴⁴);
- iron and steel industry (1984; 10 years of anticipation) (¹⁴⁵);
- harbours (1984; 5 years anticipation or else increasing of 5 years of contribution to be added to minimum 30 in order to reach the 35 required for seniority pension) (¹⁴⁶);
- car industry and air transport (about the end of eighties).

In 1991 a new kind of protection against unemployment, due to crisis or restructuring of a company or of a whole sector of the industry, was created: the “indennità di mobilità” (mobility

¹⁴² L 5 novembre 1968, n. 1.115 “Estensione, in favore dei lavoratori, degli interventi della Cassa integrazione guadagni, della gestione dell'assicurazione contro la disoccupazione e della Cassa assegni familiari e provvidenze in favore dei lavoratori anziani licenziati”.

¹⁴³ L 23 aprile 1981, n. 155 “Adeguamento delle strutture e delle procedure per la liquidazione urgente delle pensioni e per i trattamenti di disoccupazione, e misure urgenti in materia previdenziale e pensionistica”

¹⁴⁴ L 5 agosto 1981, n. 416 “Disciplina delle imprese editrici e provvidenze per l'editoria”

¹⁴⁵ L 31 maggio 1984, n. 193 “Misure per la razionalizzazione del settore siderurgico e di intervento della GEPI S.p.a.”

¹⁴⁶ L 13 agosto 1984, n. 469 “Modifiche al decreto-legge 6 aprile 1983, n. 103, convertito, con modificazioni, nella legge 23 maggio 1983, n. 230, ed alla legge 17 febbraio 1981, n. 26, recanti misure per fronteggiare la situazione dei porti.

compensation), as a part of a net of protection measures set up to manage the workers' transition from job to job. Indeed, the new law provides for: a compulsory negotiation between employer and trade unions in order to avoid destruction of workplaces or, however, about the choice of the workers to be dismissed; an amount of the indemnity adequate to keep the worker during his search for a new job; a variable duration of the compensation, as a function of the expected condition of the labour market per economic/geographic area and age group. If a worker under compensation gets a new job, the payment ceases or is just suspended for the same duration of the new contract, leaving untouched the part of the compensation yet to pay.

In a more recent past, and yet today, hybrid kinds of early retirement are lasting, in sectors in which the mobility compensation is not suitable. Often these kinds of protection provide for an advance payment of pension conditional on payment of remaining contribution up to the minimum required, which is compensated by the company.

Anyway, regardless to its kind that was at hand time-by-time, early retirement has been playing an important positive role in the years of the deepest crisis. It assured some continuity of earning to workers and, at the same time, relieved employers of redundant workforce and of the contribution connected with the use of social safety nets of a different kind, i.e. CIGS or mobility.

On the other hand, it must be considered that this peculiar kind of social security protection conflicts with any possible action aimed at increasing the employment rate of workers in the higher age groups. As we've just seen, voluntariness of choice, prohibition of adding work and pension incomes, finality of the pension draw early retirement as a powerful tool of exit, rather than inclusion, of senior workers from the labour market.

Incentives to stay at workplace

Indeed, the first kind of statutory measures that provides incentives to keep older workers at work were born after the age of early retirement.

First of all, it must be considered that each of them can be found in a law act referring to pensions, and their main purpose is to reduce pension outcome rather than encourage work activity of older people or protecting the weaker social groups.

Secondly, having early retirement outlived its usefulness, these measures are more or less all aimed at fight the "spontaneous" phenomenon of leaving the job as soon as the conditions for any kind of pension are reached. So most of them introduce a sort of softening of the threshold between work and pension.

The first of them provided for delaying up to 62 (from 60) years of age the limit of protection against illegitimate dismissal, in private sector and, in state administration, the automatic dismissal due to age. Every contributions paid during the time of delay would give an extra amount on future pension, even if these contributions exceeded the 40^o year – what in normal conditions wouldn't have given no yield (¹⁴⁷).

Only two years after, this measure had to be strengthened: with the first pension reform, the yield of contribution paid during the same period of delay was increased of 50% but this benefit was limited to years within the limit (normally fixed at 40) (¹⁴⁸).

Later, in 1995, with the second pension reform (¹⁴⁹) a new model was experimented: notwithstanding the provisions in force regarding compulsory resigning or dismissal before claiming the pension and the prohibition of adding work and pension earnings, a worker who fitted the required conditions of age and contribution could change his job from full to part time and get the pension at the same time. Henceforward, both wage and pension converged to make the whole income of the worker, each one proportional to the ratio (not to set under 50%) of the part time hours on full time, within the amount of the original wage.

¹⁴⁷ L 29 dicembre 1990, n. 407 "Disposizioni diverse per l'attuazione della manovra di finanza pubblica 1991-93", art. 6

¹⁴⁸ DLgs 30 dicembre 1992, n. 503, "Norme per il riordinamento del sistema previdenziale dei lavoratori privati e pubblici, a norma dell'articolo 3 della L. 23 ottobre 1992, n. 421", art. 1

¹⁴⁹ L. 8 agosto 1995, n. 335, cit. The measure was in art. 1, comma 25, lettera c), afterwards cancelled by art. 1, comma 209, L 662/1996

In this way, on one hand, the employer could have a good reduction of the cost for wages and social security contributions, without affecting its staff's performance. On the other hand, the worker could obtain a good reduction of working time without decreasing the total income. In this perspective, eventually, the pension system could benefit from a good reduction of pension expenditure for a more or less long period of time.

Surprisingly enough, this measure was cancelled not more than a year after and was replaced with a similar one, that was subject to a couple of conditions more: the employer had to engage as many new employees as were the transformations into part time that he had allowed and the whole operation was to be approved by the Welfare department (¹⁵⁰). It could be a necessary incentive to create new jobs but, from that moment on, this measure ceased to be an incentive aimed at keeping older workers in their workplace. Even in state administration, where the engaging clause couldn't be introduced, the number of condition required (among that the absence of redundancy in the functional qualification which the worker belongs to) has brought this opportunity by now to a dead end track.

Of quite a different kind is the system invented by the Government in charge in 2004, the so called "Incentive for postponing retirement" (*Incentivo al posticipo del pensionamento*) or "Superbonus" (¹⁵¹). Until the end of 2007, workers owning the conditions required for seniority pension (that is before legal age of retirement) were allowed to hold, in addition to their wage, the amount of social contribution – both the part they should have paid and the part their employer should have. To sum up, worker's income could increase up of a net amount corresponding to a third of the gross salary – in Italy social contributions are tax-free.

We are talking about an immediate benefit, a concrete and safe alternative to the choice of dismissal, with its tempting severance pay, additional benefits and so on; nothing affects the workplace and the employer hasn't any additional charge to bear, since the contributions to be paid only changes destination. So, this time the device invented has all the numbers to be successful. But.... In case of acceptance, the worker is to be considered as a retiree: the pension amount is calculated including only the contributions paid by the time the worker makes his claim and it is sort of frozen until the end of the work. At the end of the period allowed (in any case not beyond 2007) the worker can both retire, earning the amount pre-calculated some year before or else keep on working. In this second choice he has to re-start paying contributions as before, until the moment he/she decides to go or reach the legal age of retirement. Every contribution paid henceforth cannot affect the making of amount of pension, already calculated and frozen, but must be computed only as a supplement of it.

Here may lay the main reason of the flop of this further attempt: as the contribution pocketed by the worker is missing forever, the pension can be seriously damaged. It is not a coincidence that "superbonus" was claimed mostly by workers who had already reached the maximum of contribution possible: in Italian system, any year of contribution over the 40° has no effect on the amount of pension.

In a chronicle line, the attempts of Italian legislation to encourage older workers to keep on working stop at 2004. It seems as if Italian legislator has given up trying this way. More, there are signs that we're moving back: in 2010, since it was in contrast with the necessary reduction of state administration workforce, the incentives provided by the law 407/1990 have been suspended indefinitely (¹⁵²).

¹⁵⁰ L. 23 dicembre 1996, n. 662 "Misure di razionalizzazione della finanza pubblica", art. 1, comma 185.

¹⁵¹ L. 23 agosto 2004, n. 243, "Norme in materia pensionistica e deleghe al Governo nel settore della previdenza pubblica, per il sostegno alla previdenza complementare e all'occupazione stabile e per il riordino degli enti di previdenza ed assistenza obbligatoria", art. 1, comma 12.

¹⁵² Art. 72, commi 7 e 11, DL 112/2008 conv. L 147/2008

3.2. Specific initiatives to promote changes in work organisation in companies

Work organization in companies is a factor that is managed in very different ways, according to various factors, such as: the size of the company, the sector/market of reference, and the internal practices of the companies. So, the measures adopted may vary according to specific circumstances. Solutions can, for example, be effectively reached also through agreements with trade unions at company/sectoral level. But the issue of “adequate work organization” in Italy has also been addressed by legislative measures at national level, which partly refer to older workers.

A very recent legislative provision (Legislative Decree n. 24/2012) has recognized the possibility to extend the use of agency work with fixed-term duration - without obligation to indicate the technical/organizational/replacement reasons - also to disadvantaged workers (EU Regulation n.800/2008), among which older workers aged >50 are included.

It is worth noting that the decree law reforming the Italian labour market promoted by Monti's Government – still pending before the Parliament – provides a 50% reduction of the contributions to be paid by the employers for workers aged 50 or more - who are unemployed since more than 12 months - if recruited with subordinate contract as from 1st January 2013. The contribution reduction of 50% applies for 12 months.

3.3 Additional comments on the theme “Adequate work organisation”

European labour markets will see in the next years major demographic changes with fewer people active compares to a growing number of people in retirement.

A mass of skills will be lost as a generation of experienced and skilled workers goes into retirement; at the same time, there will be a reduction in the number of people entering the labour market. This will have an impact on companies, which always need a supply of skilled people to remain competitive. So, demographic issue will strongly affect the work organization in our companies.

An adequate work organization within companies specifically focused on older workers has become today an urgent issue to manage, also with specific regard to the recent legislative provisions that have postponed the retirement age in Italy. According to Law n. 214/2011, in 2018 the old-age retirement for Italian workers will be of 66 years for both men and women, with indexation to life expectancy; from 2012 to 2018 the retirement age will be progressively increased: equalization age for men and women shall be so reached in 2018 and fixed at a level not lower than 67 years old from 2021.

So, in this new context, action is needed by both companies and individuals. The concept of adaptability will play a central role: older workers need to adapt to new working methods, new technologies and different working patterns. Skills need to be developed and adapted from the start of and throughout the working life.