



Active ageing through Social Partnership  
and Industrial Relations in Europe

Progress Report

Phase one (January to December 2017)

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Industrial Relations in Europe

VS/2016/0379

# ASPIRE Progress Report

In fulfilment of Article I.4.7 of the grant agreement for VS/2016/0379, this is a progress report of the first twelve months of research activities and fulfilment of the ASPIRE work programme.

The aim of the ASPIRE project is to understand processes through which social partners develop, pilot and implement active ageing interventions (including collective agreements) and reorient away from a collusion toward early retirement<sup>1</sup>.

The project intends to work with employers and trades unions in manufacturing and the public sector in the four countries.

The project's research questions are:

1. How do different industrial relations (IR) structures facilitate and/or inhibit the dissemination and implementation of collective agreements on active ageing?
2. How are age and employment perceived in workplace contexts within different IR systems?
3. How do employers and trade unions respond to EU and national social activation policies in creating sustainable work opportunities for older workers?
4. How are the interests of older and younger workers negotiated and reconciled through workplace level mechanisms?
5. How are good practice and innovations in the dissemination of active ageing approaches shared between and within different national contexts and in Europe?

The project will produce three deliverables:

1. A one day training module for HR professionals
2. A web based resource for sharing good practice
3. A social network for practitioners

The project has 9 Work packages:

WP	Task	Months	Action and outputs	Lead
1	Project Management	1-24		UK
2	Dissemination	1-24	Disseminate results to stakeholders and policymakers	IT
3	Research consolidation	1-6	Review of research and policy, national reports. Four pilot interviews	PO
4	Pilot workshop questions	6-10	Finalised and valid research tools	PO
5	Data collection	10-15	4 workshops per country	UK
6	Analysis of data	15-18	Summaries of evidence. Pilot education and training materials	UK
7	Training	18-21		ES
8	Implementation	21-24	Finalised education/training materials	ES
9	External evaluation	3-24	Formative and summative evaluation report on whole project	UK

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<sup>1</sup> Active ageing means helping people stay in charge of their own lives for as long as possible as they age and, where possible, to contribute to the economy and society. *DG Employment, Social Affairs and Inclusion*

This report reports progress to Work package 5 (Facilitated Workshops).

## **Work package 1: Project Management**

### **1. Project meetings**

There have been two transnational project team meetings to date:

1. A kick-off meeting at the Italian partners' headquarters in Bergamo, Italy (24-25 January 2017)
2. A transnational meeting on the Polish partner's campus in Lodz, Poland (11-12 October 2017)

At the first transnational meeting, each project leader gave a summary of the current state of the art on ageing workplaces in their respective countries. Presentations discussed current labour market context; relevant public policies in relation to ageing and industrial relations; pensions and the welfare state; relevant stakeholders; and associate partners in the project. The purpose of the presentations was to provide an understanding within the team of the context of ageing workplaces and social partnership in order to identify areas of convergence and divergence in terms of how different stakeholders- especially social partners- are addressing the issue of ageing workplaces. Following the presentations, the group mapped out a ten-month workplan to reach the targets up to our second transnational meeting. Detailed dissemination and evaluation plans were also agreed which will be discussed in their respective sections.

At the second transnational meeting, the group discussed progress in our activities. Having completed Work package 3, the team discussed findings from the national reports, agreed a format for publication, and agreed a consolidated summary as drafted by the project coordinator. The team also was joined by a Newcastle University colleague who had produced an online training module for workers with eldercare responsibilities to assist them in requesting flexible working. Because one of the deliverables is a web-based resource for sharing good practice, the Newcastle colleague provided guidance on suitable platforms, structuring of material, graphics and delivery. The group also agreed a protocol for workshop discussions for WP5. As the work programme was moving into the data collection stage of the research, it was agreed that we would also hold monthly online meetings to discuss progress.

### **2. Administration**

There were some initial problems with administration, preparing the consortium agreement and in some cases over recruiting researchers. In the UK, delays in processing job specifications and advertising for the research assistant post as well as one candidate accepting an appointment meant the appointment was not made until 3 May 2017. The delay in the appointment has fortunately not led to a delay in delivering the work programme and we remain on target. However, it had meant that for roughly a fifth of the project, the project coordinator was working without support.

The project coordinator (UK) made a career move from Newcastle University to Hull University in August, with some accompanying administrative disruption, but the work remained on course and a fractional appointment was made by Newcastle University for him in order to complete this role.

## **Work package 2- Dissemination**

Following the inaugural meeting, the Italian partners designed a Moodle platform for the project team to communicate and exchange information. Discussion threads were organised according to work package activities.

A website was created to disseminate project findings to the wider public. It can be found here: [www.adapt.it/aspire](http://www.adapt.it/aspire). The website contains the following material:

- Blog posts written by project team members: We are aiming to produce at least a blog piece a month and have so far produced pieces on social dialogue, retirement, public service commitments on ageing, active ageing as a social and economic framework and the discontented older worker. Blog pieces are being disseminated via the Adapt International Newsletter, CROW website and Huffington Post.
- A Resource page which contains good practice guides, policy documents, case studies and other material produced by both the project team and our associated partners on ageing workplaces and social dialogue. Material as well as short summaries are written in native languages in order to provide material to audiences in all four countries.
- National reports and a consolidated executive summary have been produced and will imminently be included on the website.
- A Twitter account has also been set up so that project partners can share news stories about labour market, pension and ageing issues within their respective countries as well as publicise events which are part of the project. This can be found at @agediversity.

There have been three events to showcase the project with academic and practitioner audiences as well as seek feedback from colleagues internationally:

- A presentation of the project was delivered to the 21st IAGG World Congress of Gerontology at a pre-conference symposium organised by the Sloan Center for Aging and Work. The presentation, titled "Articulating Age: Different Perspectives from Employers and Unions" discussed the context of the project and the reorientation of industrial relations in Europe from one which encouraged early retirement towards one promoting active ageing.
- A seminar workshop is being held at University of Hull on 9 March and stakeholders with whom we are working (including Humber LEP, TUC and IPPR North) will discuss their work on the subject.
- A training session for COST Training School, Brno, Czech Republic is scheduled for 19-21 March. In the session, we will be discussing the project and testing a structure for the training material and web-based tool which will be delivered in later WPs.

## **Work package 3- National Reports**

At the kick-off meeting, and in subsequent correspondence, a broad format was agreed for the national reports, which were to provide the basis for consolidating knowledge of research and policy. All partners produced the national reports on time. All were substantial documents, with extensive coverage of the issues, and they provide an important basis for identifying issues for the next stage of the work. For understandable reasons, the reports varied in emphasis and coverage, and only one followed the agreed format to the letter. However, reading them together, it is possible to identify a large set of contextual issues which might be expected to affect the design of the rest of the project work.

In the process of producing the national reports, the project team identified additional stakeholders who have expressed interest in the project and supporting us in subsequent work packages, especially WP5. The additional stakeholders are complementary to our associate partners and their contributions will provide a more rounded perspective on how social dialogue in each of the countries is leading to innovative approaches to workplace active ageing. They will also be helping us to build content for the online resource and training material. Stakeholders whom we have

consulted (in addition to our associate partners) include North East Local Enterprise Partnership (LEP) and Humber LEP, both of which have task and finish groups on older workers; Institution of Occupational Safety and Health (IOSH) who are supporting the organisation of a workshop of occupational health specialists; Unite the Union; Prospect and the London HR Network.

The national reports have been formatted into publishable PDF files and will soon be posted onto the ASPIRE website. Each report is complemented with an executive summary. A consolidated executive summary and summary of European transnational research on ageing workplaces have also been produced and will be included on the web page.

## **Work package 4: Pilot workshops**

A protocol was established for the workshops to be held in Work package 5. In addition, in order to comply with university ethics rules of our respective institutions as well rules of the funding bodies, a “Statement of Informed Consent” was drafted and agreed. Finally, a short feedback form was produced to assist the evaluator in evaluating the value of the project to workplace union representatives and managers. The protocol was developed for discussion at the Lodz transnational meeting. Amendments to the protocol were made and it was agreed that the protocol would be treated as flexible and some adaptations would be made to ensure that the approaches and questions would be relevant to the contexts of the different countries. The protocol was adapted so as to take an ‘hourglass’ approach to the discussions- with broad questions to give participants the opportunity to contribute their ideas and perspectives followed by more specific questions as necessary to fill in gaps.

One of the outcomes of piloting was a recognition that different groups of participants had different levels of understanding of the subject and different levels of engagement. Powerpoint slides were developed to facilitate discussions. In some cases, participants were asked to complete ‘homework’ and tasked to consult their union constituents and/or employees on some of the content, while in other cases participants expressed a willingness to be consulted at later stages of the research. Following the pilots, the group discussed the outcomes of the pilot workshops framed around pre-disposition of participants, attitudes toward component ideas, specific contributions, energy to go further and practical conclusions. Each team wrote up a summary and circulated it to the group. It was agreed that we would have a toolbox of material to include not only the protocol but also slides and other material which we are using in the workshops which can be shared with one another.

## **Work package 5: Data collection**

We are currently conducting the main workshops for the project. The aim is to have them completed for a discussion at the third transnational meeting scheduled 11-12 April. In organising the workshops, we are also organising complementary sessions with occupational health specialists and sector specific groups both on the union and employers side in order to identify industry specific issues with age and work. We are also trialling different forms of delivering the workshops in order to get as broad a perspective as possible. We are attaching workshops to events such as conferences and networking events in order to attract large audiences and trialling the use of webinars to reach managers who might not be available for a face-to-face group discussion.

## **Work package 8: Evaluation**

At the Bergamo transnational meeting, the evaluator presented an evaluation structure and set of processes. It was agreed that the evaluation would focus on progress which was being made on the

delivery of the work programme and aspirations for broader outcomes, both for ourselves and associate partners. The evaluation would therefore cover both research outcomes (e.g. the quality of data which is being collected, evaluation, cross-comparison of national reports) and social impact. Quarterly surveys of project team members are being carried out by the evaluator asking two sets of questions: 1) Is the project progressing as scheduled (e.g. Have deliverables been produced? Is the budget being spent as planned? Are there unexpected developments?) and 2) broader social changes which are impacting on the project such as changes within the organisations we are working with, national contexts and within our own organisations). A feedback form has also been developed to use with workshop participants.

## **Equality considerations**

The project team is ensuring that equality considerations are taken into account both in terms of project delivery and project focus. Each of the project reports have focused on how age intersects with other protected status characteristics including gender, race and disability. We have included in the workshop protocols prompts to discuss with participants how extended working life is impacting a range of older workers and the impact of multiple forms of discrimination on older workers. For example, workshop participants in the UK have discussed the impact of equalisation of pension ages on women in their late fifties and early sixties and the challenges which career interruptions and elder care have on their retirements.

## **Continuity**

Although the final deliverables have not yet been produced, we are setting the groundwork for ensuring that use of the material is sustainable after the conclusion of the project. We are working with our associate partners as well as new collaborators (e.g. LEPS, IOSH, BITC) to mainstream our training and online platform for use by managers and union reps in all four countries. We will home the online platform on ADAPT Moodle and Voice North platforms to maximise outreach.

## **Conclusion**

The project is on schedule and milestones have been reached. There have been some administrative delays at the beginning of the project beyond the project team's control, but we have been able to minimise the disruption and ensure we are reaching our targets. There have been a number of positive unexpected outcomes of the research including the support of organisations beyond our associate partners who are willing to help in the organisation of workshops and development of content for the training and online resources. The project team is working well together and through the consolidated executive summary, we have identified public and organisational policies and practices which provide scope for cross-comparison and sharing of innovative practices.

**Professor Matt Flynn**  
**Project Coordinator**  
**ASPIRE**