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| **Heading** | **UK** | **Poland** | **Spain** | **Italy** | **Areas of commonality** | **Areas of difference** |
| Barriers and Facilitators | **Barriers***National*Low levels of awareness of Joint DeclarationLack of collaborative culture in UK contextLack of social dialogue on work processesOlder unemploymentRegional economic disparity*Organisational*Work intensification- no time for planningLow levels of unionisation-patchy framework for collective bargainingEmployers preference for young workers with more recent skillsChanging nature of work making older workers’ skills redundantReluctance to have difficult conversationsSMEs lacking HRM policies/collective bargainingSenior managers not seeing as big issueAccommodations for older workers being perceived by others as special treatmentWork intensification and lack of time for planningManagers worried about talking about retirement due to abolition of DRALack of dialogue on the subjectWorries about treating older workers like a special groupUnintended biases in relation to recruitmentDifficulty demonstrating the business case for investing in older workers within the context of short term profitabilityReliance on agencies to provide staffManaging staff on callTwo tiered workforces with older workers being passed over for younger colleagues with qualificationsContracting out making it difficult to offer older workers alternative workSome managers report more constructive work relationships than other parts of Europe*Individual*Rising pension ages creating inequalities especially in relation to gender, income and sectorGenerally, work is becoming more precarious for man older workersIndividualisation of learning and accreditation (eg construction)Impact of childcare and career interruptionsImpact of health on work- back problems, poor diets, stress, etcDifficulties discussing age related problems with managersPerceived reluctance of older workers to trainWomen expecting/planning toward retiring at 60Career interruptions and impact on career pathOlder people being knocked off course because of changing family or work circumstancesFear of being singled out as less than committedAgency workers receiving lttle supportNot being able to afford to retirePrecarious work and reluctance to ask for helpLong working hour culture in some sectorsBeing knocked off course because of job restructuring/change in the organisationFatigue and being fed up **Facilitators***National*Some employers starting to feel the pain of demographic changeLack of young/middle aged workers in labour marketRegional focus on age inqualitiesConcerns over impact on regional developmentWorries over BrexitHigh level of awareness of UK government policies on active ageing- raising real retirement ages, abolishing mandatory retirement,Some regional acivities to promote active ageing through collaboration between stakeholdersDifferent drivers for managing age:-Manufacturing: Old current workforce, skills shortages- Finance and retail: skills shortage, turnover-Higher ed some career blockageDemand for skills due to lower migrationMajor initiatives on career transitions (unionlearn, mid-career reviews)Pension system encouraging (forcing?) longer working livesApprenticeships to get older workers into work*Organisational*Desire to retain key skillFacing a large cohort of staff about to retireEmployers having to recruit from larger pools of workersLack of availability of young people for apprenticeship rolesDifficulties some employers face in retaining youn staffReemergence of demand for some traditional skillsEmployers making use of older workers in mentoring and upskilling youngerPerception of ‘retired’ workers’ flexibilityUnionlearn and the role of reps facilitating learning and career planningUnions’ role in community based activities (supporting non-traditional workers in sustainable work)Unions’ role in promoting decent work*Individual*Recognition that people are *generally* living healthier longer lives (although still great inequalitiesChanging lifecourses (people starting families, buying home, etc at different times)Work is part of identity- providing social networks, life structure. Leaving work for some can represent a real lossLife planningSome older workers having good networks to find work | **Barriers***National*Constant changing of pension systemShould be more government’s responsibilityLack of communication on ageing*Organisational*Lack of availability of “sheltered” jobsLoss of professional rolesPerception that young workers are cheaperShort term pressure over-riding sustainabilitySupervisors intensifying workEmployer giving early severance and rehiring on consultancy basis*Individual*Lack of trust in the pension system due to constant changeSocial expectation of early retirement given changes to retirement agesNeed for older people to take care of elderlyDemand for strongest/fittest staffBurn outInequalities in work contextAssumptions about older workers’ desire/ability to workSome workers unable to continue in work (tired/worn outWork intensificationWomen with career interruptions**Facilitators***National**Organisational*Acceptance of ageing as an organisationl issue by boardroom“Nothing new”in active ageing- senior managers always want to pass knowledge onto youngerConcerns about labour shortages*Individual* | **Barriers***National*Lack of legal instruments for introducing active ageingUnpopularity of partial retirement incentives*Organisational*Lack of awarenessDifficulties with legal and social policiesHR policies Difficulties in adapting workplaces for older workersDifficulty reconciling active ageing with productivityHigh costs of adaptingLack of awarenessContinued encouragement of early retirementSelecting who will get help and who won’t Redundancy costs sometimes less than keeping older workersRigidity of HR policies in the public sector*Individual*Adaptation is perceived as labellingFear of being made redundantFeeling barely hanging on and fearing engaging with managersLow motivation for planning retirement**Facilitators***National**Organisational*Increased awareness of importance of active ageingRecognition of the potential for workforce managementEmphasis on not discriminating on the basis of ageJob adaptations which have been tried at the individual level*Individual*Some older workers not being able to afford to retire (eg not full pension contributions) | **Barriers***National*Lack of awareness of statutory legislationGovernment incentives favour employers retiring older staff early and hiring young workers*Organisational*Not a top priority of organisations nowIn many sectors, ageing historically managed through early retirement paid for by sectoral funds paid by companiesLack of public policies led companies to to rely on early retirement to manage ageShort-termism making it difficult to make active ageing a priority issueSMEs have culture of informality over looking formal needs like for trainingSome concern from unions that employers managing age unilaterally causing dualism (only most profitable companies willing to invest)*Individual*Workers’ attitude to change mixedResistance to downshifting (eg fear of being singled out)Some worker perceptions that older workers paid more for doing lessYounger workers perceiving having to make up for older workers’ lack of productivity due to absenteeism*Industrial relations*IR is usually conflictualNot part of the social agendaUnions’ ability to influence depdens on representative power which is decliningTrade unions traditionally seen as uniform class needing singe response interms of rights and T&C**Facilitators***National*Civil code allowing employers to use bilateral funds for job rotation and job change (but some reluctance from employers given resistance from employees to downshift)Intergenerational Solidarity Pacts:facilitating job sharing and knowedge transfer (but poorly implemented can encourage early retirement)*Organisational*Companies focusing on active ageing as it affects productivitySkill shortages driving change according to employer associationTradition of strategies emerging from the shop floorWorkers wanting actionIdea of sustainability importantEmployers (especially large ones) diversifying work roles and more likely to see older workers as needing specific types of support*Individual*Company ‘big city’-location of social interactions*Industrial relations*Some sectors have bilateral projects embedded in IR and have a cultural of sustainability ( | **Barriers and facilitators***National*Low levels of awareness of active ageing regulations (although UK mainly playing out in terms of EU declaration and policy)Patchy reach of social dialogue*Organisational*General acceptance of importance of active ageing but not a top priority for businessesShort term pressures dominate. Managers don’t have time for long term planningParticular problem for SMEsWork intensification making active ageing difficultDifferent pressures by sectorsNeed for business case for organisations*Individual*Workers uncertain of their pension rights/responsibilitiesLack of preparation for working longerConcerns over active ageing and older womenInequalities within older workforceImportance of work as part of life generallyFear of older workers being pushed out of workLack of opportunities to change jobs in later life | **Barriers and facilitators***National*Early retirement/pension incentives (early retirement incentives still dominate in Spain and Italy; not in UK; mixed in Poland)How coordination occurs/active ageing is disseminated through management/union chains (Spain/Italy top down; UK/Poland bottom up)*Organisational*Different ideas on how easy/difficult to retain older workersPerceptions on whether older workers are too costly to retainEmployers willingness to use early retirement as management tool (UK is less common but other ‘push’approaches pervasive)*Individual*Expectations of older workers about having to work longer |
| Perceptions | Active ageing primarily driven by economic factors rather than perceived social benefitsUniversal perception of active ageing as good.Low key ageism still in operation (especially recognised by union reps dealing with individual cases)Unions noting older workers being marginalised- not being offered exciting tasks, not having FTCs renewed or being replaced by younger (cheaper) staff. Perception that certain jobs are young people’s workNew career paths being offered but older workers being excluded because of a lack of formal qualificationsWorking longer largely impacted by individual characteristicsOlder workers fearing being pushed into capability proceduresOlder workers feeling pressured to work at same pace as before- feeling harassed if can’t keep upEmployers reluctance to adjust older staff’s workload for fear of not treating all staff equallyOlder workers’ fear of getting stuck- not being able to change work because can’t find jobs which are as well paid- resulting in lack of motivation and feeling of just hanging on | Unions not understanding the scale of the problemExamples come down from above‘Problems arise in conflict situations | Lack of awareness on both sides of the issueBusinesses wonder who will pay the cost of active ageingEurope imposing active ageing with blessing of those needing to implement itStill perception that to age well you need to stop working as soon as possible.Question why new technology can’t pick up slack of labour shortagesExperience connected to inter generations needs to be valuedDiversity of jobs does not allow for uniform responseAgeing well involves combining physical and mental well-beingActive ageing should be a voluntary option | Active ageing is a common concern for employees and employersBilateral bodies crucial to shaping active ageingIntegrative bargaining better than distributive bargaining in shaping active ageing policiesThere should be coordination of active ageing policies with public policiesSectoral differences require sectoral funds, bargaining to implement active ageingSMEs have more informal processesCooperation is the key factor but in some sectors, industrial relations is conflictual and efficiency pressure prevails over sustainabilityActive ageing should be seen within the wider context of society, economy and labour market as a whole.Broad issues of ageing need a new social contract for allNot just about work but also keeping older people who have abandoned the labour market activeActive ageing as promoting early retirement to promote intergenerational exchangeActive ageing to promote permanence of older worker in their job positionAge in terms of needing adaptations depends on occupationBest practice is where management is more sensitive to the issue liked to labour cost and productivityAgeing not an issue where average age is lowGovernment needs to fund some measures and involved in discussionUnions have collaborative and proactive approach and their support is fundamental as they know the needs of the workforceNew technology having a contradictory impact on older workers- on the one hand making work less physically demanding (especially for older workers) but needing new skills to remain employableFlexible working perceived as high cost even where NCLAs dictate. Unions vocally advocate prioritising older workersUncoordinated forms of collective bargaining (employers not following NCLAs) likely to heighten age based wage inequalities | Continued pervasiveness of ageismMarginalisation of older workersUncertainty over the impact of technology on having to work longerConcern about treating older workers as a special class of workers needing supportScope for constructive dialogue between union and employersImportance of other activities (exercise, community volunteering, social network) in healthy ageing | Perceptions of work within the context of active ageing (central in the UK, more peripheral in other countries)Some differences in priority of approaches to active ageing (UK focusing on career change and planning; Spain on health; Italy on intergenerational coordination |
| Intergenerational | Mixed views on intergenerational inequalities. Questions of whether generation is more significant than inequaities created for example by genderGenerational divide interms of access to access to higher education/ formal qualificationsNEET young people thought to be at risk of exclusion- being denied opportunities for fulfilling workReliance on older workers in some sectors due to licencing and regulatory requirementsSocial inequalities exist over planes other than age (eg gender, class, etc) Both older and younger workers in casual workWrong to assume younger workers want spontaneity and flexibility but olders want stability- may depend on lifecourse and periods when people need stable work circumstance and when they can have an adventurePopularity of idea of intergenerational work teams, mentoring, reverse mentoringSome employers (public sector) have intergengerational employee networksMentoring thought to be a good way to retain inhouse knowledge.Thought to be a way to make older workers feel more fulfilled |  | Transfer of knowledgeAssuming responsibility-older people could make way for younger workers taking on some responsibility and gaining experiencePerception that there is a conflict between older workers needing expanded hours and younger workers needing growth and stabilityMentoring neededJobsharingMeasures practically non-existent | Intergenerational relay mechanisms: Older workers turned into part-time jobs and young people hiredApprenticeships (regulated via collective bargaining) good for promoting older worker mentoring and cooperation with young peopleMentoring and reverse mentoring most usedActive ageing a process where over 55’s transfer knowledge in a structured waySmall firms- generally have greater solidarity, especially in family firms, supporting intergenerational transferPerceived generational inequalities: younger workers having lower labour costs, pension reforms reduced possibility of hiring young workers (?); employed on more precarious work contracts; treated more harshly in appraisalsCollective bargaining sometimes creating dualism (eg bonuses not being paid to approatices) and pay freezes only applying to new recritsMentoring can occur spontaneously but sometimes older and younger workers jealous of skills and unwilling to transfer themUnions can create conditions to promote solidarity by supporting cooperation and collaboration (promoting traditional labour rather athn managerial approach to work)Example given of intergenerational work teams- younger workers bringing creativity and older having strength in technical jobs requiring professionism, experience and seniorityMentoring and reverse mentoring most common forms of intergenerational transfer. Apprencticeships also have informal approaches to knowledge transfer from older to youngerIntergenerational solidarity pacts to increase youth employment but involving older workers through skill transfer | Value of knowledge transferMentoring a valuable tool for mutual supportConcerns over peripheral work and younger workers | Differences in importance of intergenerational aspectsDifferences in views on whether older workers are displacing younger ones Pervasiveness of intergenerational approaches (Italy seems to have gone furthest with intergenerational solidarity pacts) |
| Responses | Focus on individual rather than collective rightsEmployees have primary responsibility for own careers but can get support from union reps through ULR, mid career reviews, etcGood practice shared through bottom up (informal networks within and between organisations) rather than top down (collective agreements)Little incentive for employers to provide support for older workers in contingent work (ftcs, casual work, agency staff)Collective bargaining thought iadequate to deal with joblessnessLeadership considered key for developing approaches to active ageingEmployers worrying about new regulations- having to deal with the raft of change | Communication is the key from management to employees on retirement planningUnions could promote training and organisational awarenessShould not force people to work longer but provide incentives | Practically non-existentA few adaptations to deal with poor health or incapacityAdaptations to ensure better healthPreparation of reports to occupational health to see what adaptations are necessaryProcedures to promote retirementPreferential attention to older peopleSupporting older people needing to reach pension contributionUse of replacement contract for semi-retired workersSocial action programme for leisure and sportsFind formulas for adapting late stages of work lifeBuild consensus among social partners on need for active ageingMake businesses aware of business case for active ageingSet up permanent working group on active ageing within companiesFinancial mechanism for funding active ageing measuresImproving communicationsValue experience of older workersProper management of multigenerational workfores | Need to support older displaced workers who find it most difficult to find new work mainly respond through intergenerational solidarity pactsEarly retirement prevails as main way for dealing with ageing workforcesInstitutions not age based regs and institutions can be shaped by active ageing goalsLifelong learning as well as occupational welfare measuresActive ageing in work could overcome stereotypes of older people as a burden on societyOutplacement policies to support those who have retired early (work transitions)National collective agreements concluded through bilateral bodies best approach to managing ageEven in sectors which are flexible specific measures needed to support older workers adapt working hours in transition to retirementResponses need to be tailored to individual worker but are often impersonal and generic (eg training)(From employer) incentive system should be implemented to incentivise employers to use bilateral funds toward active ageingUnions favouring top down approach- agreements in NCLAs across sectors and implemented at workplace level through bilateral funds | Need for more communicationLack of formal HRM approaches on ageingIndividual approaches to retain staff with key skills commonLess common of active ageing for more marginalised staff (eg casual staff, those lacking formal qualifications, part-time staff)Importance of health managementImportance of financial and career planningImportance of unions in giving older workers a voice | Emphasis on individual versus collective rightsWhether early retirement should still be promoted as part of active ageing |
| Good practice | BAE System: phased retirement being used to start conversation on retirement plansFinancial planning- some employers providing advice from indepdent sourcesFlexibility thought to offer some choice but some staff on enforced flexibility (lower paid/less opportunities)Some employers feeing it is difficult to manage work rotas with flexibility (some feeling the oppositeSupport for older women who had expected to be able to retire at 60 but having to work longer- menopause, career interruptions, gender and age discrimination mentioned)Rple of health and safety reps through HSWA in enforcing health and safety standards.Unionlearn and unions’ role in promoting career planningMid-life career reviews and delivery of reviesAge neutral approach to recruitmentFlexible working hour arrangements to manage workload of older staff with health conditions or wlb dilemmas |  | Few examplesAdaptation of shifts and hoursOccupational health involvementTraining to help employees adaptPositive discrimination for hiring older peopleHelping staff reach full pensionRecognition of value of older workersIntroduction of age asa variable for analyising sick leavePerforming study on active ageingUsing occupation health regulations a a way to broach topic of active ageing in bargainingParticipative working community on active ageingIntergenerational knowledge managementEconomic incentives for working longerIndividual planning of retirementBetter communicationPhysical fitness equipmentPsychological support on active ageing | None identified specific to active ageingSome sectors have bilateral projects embedded in IR and have a cultural of sustainability (part-time regs, health insurance,) justified for reasons on welfare retrenchment, redistribution, work flexibilityPension funds to complement publc sector pensions to support workers with health problems to reduce workload (pt, job rotation, shift change,etc)Nuero- redundant employees being reemployed in social utlity activities to conserve and care for communityPositive action committee- to promote inclusion and diversity and monitoring action on its active ageing projectRetired union members providing consultancy, mentoring and counselling for younger activists: 1) activates them to promote their inclusion; provides union services beyond worktime; 3) promotes knowledge transferBanking sector NCLA agreement to require 4% of salary to National Employment Fund | Relatively few examples of good practice (but some high profie ones- bae systems, Nuero, Barclays)Importance of giving older workers a say in how work is organisedNeed to support older workers in financially planning | Funding good practice (Italy seems to have clear structures via bilateral bodies- other countries there seem more uncertainty)Ways in which unions can promote active ageing (UK is more focused on individual support; other countries on collective agreements at national/organisational levels) |
| What can help | Manual of good practiceBite sized chunks on active ageingShort videosPractical toolsResources for different audiences (employers, unions, local repsKnowldege sharing between union reps and managers- sharing experences and providing support to one another.Business case for decisionAmmunition for persuading senior managerPromoting employee consciousness of health issue |  | Awareness raising on the importance of active ageingHow to motivate workers socialised to early retirementExplanation of active ageing in connection with productive work environmentsMost relevant regulations and public policiesTools for introducing culture of active ageing in workplacePractical tips for personal care as people grow olderExamples of increased awareness of importance of active ageingHow other companies have started dialogue on active ageingMeasures against age discrimininationInsprirational case stuiesMotivation of older workers as a topicHow active ageing is being financed |  | Business case approach to active ageingAwareness raisingPractical tools for developing active ageingWays to encourage older workers to plan for their work and retirementExamples from other countriesCommunity of practice- sharing learning between organisations |  |