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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 Declaration  Lack of collaborative culture in UK context  Lack of social dialogue on work processes  Older unemployment  Regional economic disparity  *Organisational*  Work intensification- no time for planning  Low levels of unionisation-patchy framework for collective bargaining  Employers preference for young workers with more recent skills  Changing nature of work making older workers’ skills redundant  Reluctance to have difficult conversations  SMEs lacking HRM policies/collective bargaining  Senior managers not seeing as big issue  Accommodations for older workers being perceived by others as special treatment  Work intensification and lack of time for planning  Managers worried about talking about retirement due to abolition of DRA  Lack of dialogue on the subject  Worries about treating older workers like a special group  Unintended biases in relation to recruitment  Difficulty demonstrating the business case for investing in older workers within the context of short term profitability  Reliance on agencies to provide staff  Managing staff on call  Two tiered workforces with older workers being passed over for younger colleagues with qualifications  Contracting out making it difficult to offer older workers alternative work  Some managers report more constructive work relationships than other parts of Europe  *Individual*  Rising pension ages creating inequalities especially in relation to gender, income and sector  Generally, work is becoming more precarious for man older workers  Individualisation of learning and accreditation (eg construction)  Impact of childcare and career interruptions  Impact of health on work- back problems, poor diets, stress, etc  Difficulties discussing age related problems with managers  Perceived reluctance of older workers to train  Women expecting/planning toward retiring at 60  Career interruptions and impact on career path  Older people being knocked off course because of changing family or work circumstances  Fear of being singled out as less than committed  Agency workers receiving lttle support  Not being able to afford to retire  Precarious work and reluctance to ask for help  Long working hour culture in some sectors  Being knocked off course because of job restructuring/change in the organisation  Fatigue and being fed up  **Facilitators**  *National*  Some employers starting to feel the pain of demographic change  Lack of young/middle aged workers in labour market  Regional focus on age inqualities  Concerns over impact on regional development  Worries over Brexit  High 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 stakeholders  Different drivers for managing age:  -Manufacturing: Old current workforce, skills shortages  - Finance and retail: skills shortage, turnover  -Higher ed some career blockage  Demand for skills due to lower migration  Major initiatives on career transitions (unionlearn, mid-career reviews)  Pension system encouraging (forcing?) longer working lives  Apprenticeships to get older workers into work  *Organisational*  Desire to retain key skill  Facing a large cohort of staff about to retire  Employers having to recruit from larger pools of workers  Lack of availability of young people for apprenticeship roles  Difficulties some employers face in retaining youn staff  Reemergence of demand for some traditional skills  Employers making use of older workers in mentoring and upskilling younger  Perception of ‘retired’ workers’ flexibility  Unionlearn and the role of reps facilitating learning and career planning  Unions’ 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 inequalities  Changing lifecourses (people starting families, buying home, etc at different times)  Work is part of identity- providing social networks, life structure. Leaving work for some can represent a real loss  Life planning  Some older workers having good networks to find work | **Barriers**  *National*  Constant changing of pension system  Should be more government’s responsibility  Lack of communication on ageing  *Organisational*  Lack of availability of “sheltered” jobs  Loss of professional roles  Perception that young workers are cheaper  Short term pressure over-riding sustainability  Supervisors intensifying work  Employer giving early severance and rehiring on consultancy basis  *Individual*  Lack of trust in the pension system due to constant change  Social expectation of early retirement given changes to retirement ages  Need for older people to take care of elderly  Demand for strongest/fittest staff  Burn out  Inequalities in work context  Assumptions about older workers’ desire/ability to work  Some workers unable to continue in work (tired/worn out  Work intensification  Women 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 younger  Concerns about labour shortages  *Individual* | **Barriers**  *National*  Lack of legal instruments for introducing active ageing  Unpopularity of partial retirement incentives  *Organisational*  Lack of awareness  Difficulties with legal and social policies  HR policies  Difficulties in adapting workplaces for older workers  Difficulty reconciling active ageing with productivity  High costs of adapting  Lack of awareness  Continued encouragement of early retirement  Selecting who will get help and who won’t  Redundancy costs sometimes less than keeping older workers  Rigidity of HR policies in the public sector  *Individual*  Adaptation is perceived as labelling  Fear of being made redundant  Feeling barely hanging on and fearing engaging with managers  Low motivation for planning retirement  **Facilitators**  *National*  *Organisational*  Increased awareness of importance of active ageing  Recognition of the potential for workforce management  Emphasis on not discriminating on the basis of age  Job adaptations which have been tried at the individual level  *Individual*  Some older workers not being able to afford to retire (eg not full pension contributions) | **Barriers**  *National*  Lack of awareness of statutory legislation  Government incentives favour employers retiring older staff early and hiring young workers  *Organisational*  Not a top priority of organisations now  In many sectors, ageing historically managed through early retirement paid for by sectoral funds paid by companies  Lack of public policies led companies to to rely on early retirement to manage age  Short-termism making it difficult to make active ageing a priority issue  SMEs have culture of informality over looking formal needs like for training  Some concern from unions that employers managing age unilaterally causing dualism (only most profitable companies willing to invest)  *Individual*  Workers’ attitude to change mixed  Resistance to downshifting (eg fear of being singled out)  Some worker perceptions that older workers paid more for doing less  Younger workers perceiving having to make up for older workers’ lack of productivity due to absenteeism  *Industrial relations*  IR is usually conflictual  Not part of the social agenda  Unions’ ability to influence depdens on representative power which is declining  Trade 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 productivity  Skill shortages driving change according to employer association  Tradition of strategies emerging from the shop floor  Workers wanting action  Idea of sustainability important  Employers (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 businesses  Short term pressures dominate. Managers don’t have time for long term planning  Particular problem for SMEs  Work intensification making active ageing difficult  Different pressures by sectors  Need for business case for organisations  *Individual*  Workers uncertain of their pension rights/responsibilities  Lack of preparation for working longer  Concerns over active ageing and older women  Inequalities within older workforce  Importance of work as part of life generally  Fear of older workers being pushed out of work  Lack 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 workers  Perceptions on whether older workers are too costly to retain  Employers willingness to use early retirement as management tool (UK is less common but other ‘push’approaches pervasive)  *Individual*  Expectations of older workers about having to work longer |
| Perceptions | Active ageing primarily driven by economic factors rather than perceived social benefits  Universal 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 work  New career paths being offered but older workers being excluded because of a lack of formal qualifications  Working longer largely impacted by individual characteristics  Older workers fearing being pushed into capability procedures  Older workers feeling pressured to work at same pace as before- feeling harassed if can’t keep up  Employers reluctance to adjust older staff’s workload for fear of not treating all staff equally  Older 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 problem  Examples come down from above  ‘Problems arise in conflict situations | Lack of awareness on both sides of the issue  Businesses wonder who will pay the cost of active ageing  Europe imposing active ageing with blessing of those needing to implement it  Still 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 shortages  Experience connected to inter generations needs to be valued  Diversity of jobs does not allow for uniform response  Ageing well involves combining physical and mental well-being  Active ageing should be a voluntary option | Active ageing is a common concern for employees and employers  Bilateral bodies crucial to shaping active ageing  Integrative bargaining better than distributive bargaining in shaping active ageing policies  There should be coordination of active ageing policies with public policies  Sectoral differences require sectoral funds, bargaining to implement active ageing  SMEs have more informal processes  Cooperation is the key factor but in some sectors, industrial relations is conflictual and efficiency pressure prevails over sustainability  Active 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 all  Not just about work but also keeping older people who have abandoned the labour market active  Active ageing as promoting early retirement to promote intergenerational exchange  Active ageing to promote permanence of older worker in their job position  Age in terms of needing adaptations depends on occupation  Best practice is where management is more sensitive to the issue liked to labour cost and productivity  Ageing not an issue where average age is low  Government needs to fund some measures and involved in discussion  Unions have collaborative and proactive approach and their support is fundamental as they know the needs of the workforce  New 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 employable  Flexible working perceived as high cost even where NCLAs dictate. Unions vocally advocate prioritising older workers  Uncoordinated forms of collective bargaining (employers not following NCLAs) likely to heighten age based wage inequalities | Continued pervasiveness of ageism  Marginalisation of older workers  Uncertainty over the impact of technology on having to work longer  Concern about treating older workers as a special class of workers needing support  Scope for constructive dialogue between union and employers  Importance 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 gender  Generational divide interms of access to access to higher education/ formal qualifications  NEET young people thought to be at risk of exclusion- being denied opportunities for fulfilling work  Reliance on older workers in some sectors due to licencing and regulatory requirements  Social inequalities exist over planes other than age (eg gender, class, etc)  Both older and younger workers in casual work  Wrong 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 adventure  Popularity of idea of intergenerational work teams, mentoring, reverse mentoring  Some employers (public sector) have intergengerational employee networks  Mentoring thought to be a good way to retain inhouse knowledge.  Thought to be a way to make older workers feel more fulfilled |  | Transfer of knowledge  Assuming responsibility-older people could make way for younger workers taking on some responsibility and gaining experience  Perception that there is a conflict between older workers needing expanded hours and younger workers needing growth and stability  Mentoring needed  Jobsharing  Measures practically non-existent | Intergenerational relay mechanisms: Older workers turned into part-time jobs and young people hired  Apprenticeships (regulated via collective bargaining) good for promoting older worker mentoring and cooperation with young people  Mentoring and reverse mentoring most used  Active ageing a process where over 55’s transfer knowledge in a structured way  Small firms- generally have greater solidarity, especially in family firms, supporting intergenerational transfer  Perceived 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 appraisals  Collective bargaining sometimes creating dualism (eg bonuses not being paid to approatices) and pay freezes only applying to new recrits  Mentoring can occur spontaneously but sometimes older and younger workers jealous of skills and unwilling to transfer them  Unions 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 seniority  Mentoring and reverse mentoring most common forms of intergenerational transfer. Apprencticeships also have informal approaches to knowledge transfer from older to younger  Intergenerational solidarity pacts to increase youth employment but involving older workers through skill transfer | Value of knowledge transfer  Mentoring a valuable tool for mutual support  Concerns over peripheral work and younger workers | Differences in importance of intergenerational aspects  Differences 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 rights  Employees have primary responsibility for own careers but can get support from union reps through ULR, mid career reviews, etc  Good 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 joblessness  Leadership considered key for developing approaches to active ageing  Employers worrying about new regulations- having to deal with the raft of change | Communication is the key from management to employees on retirement planning  Unions could promote training and organisational awareness  Should not force people to work longer but provide incentives | Practically non-existent  A few adaptations to deal with poor health or incapacity  Adaptations to ensure better health  Preparation of reports to occupational health to see what adaptations are necessary  Procedures to promote retirement  Preferential attention to older people  Supporting older people needing to reach pension contribution  Use of replacement contract for semi-retired workers  Social action programme for leisure and sports  Find formulas for adapting late stages of work life  Build consensus among social partners on need for active ageing  Make businesses aware of business case for active ageing  Set up permanent working group on active ageing within companies  Financial mechanism for funding active ageing measures  Improving communications  Value experience of older workers  Proper management of multigenerational workfores | Need to support older displaced workers who find it most difficult to find new work mainly respond through intergenerational solidarity pacts  Early retirement prevails as main way for dealing with ageing workforces  Institutions not age based regs and institutions can be shaped by active ageing goals  Lifelong learning as well as occupational welfare measures  Active ageing in work could overcome stereotypes of older people as a burden on society  Outplacement policies to support those who have retired early (work transitions)  National collective agreements concluded through bilateral bodies best approach to managing age  Even in sectors which are flexible specific measures needed to support older workers adapt working hours in transition to retirement  Responses 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 ageing  Unions favouring top down approach- agreements in NCLAs across sectors and implemented at workplace level through bilateral funds | Need for more communication  Lack of formal HRM approaches on ageing  Individual approaches to retain staff with key skills common  Less common of active ageing for more marginalised staff (eg casual staff, those lacking formal qualifications, part-time staff)  Importance of health management  Importance of financial and career planning  Importance of unions in giving older workers a voice | Emphasis on individual versus collective rights  Whether early retirement should still be promoted as part of active ageing |
| Good practice | BAE System: phased retirement being used to start conversation on retirement plans  Financial planning- some employers providing advice from indepdent sources  Flexibility 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 opposite  Support 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 planning  Mid-life career reviews and delivery of revies  Age neutral approach to recruitment  Flexible working hour arrangements to manage workload of older staff with health conditions or wlb dilemmas |  | Few examples  Adaptation of shifts and hours  Occupational health involvement  Training to help employees adapt  Positive discrimination for hiring older people  Helping staff reach full pension  Recognition of value of older workers  Introduction of age asa variable for analyising sick leave  Performing study on active ageing  Using occupation health regulations a a way to broach topic of active ageing in bargaining  Participative working community on active ageing  Intergenerational knowledge management  Economic incentives for working longer  Individual planning of retirement  Better communication  Physical fitness equipment  Psychological support on active ageing | None identified specific to active ageing  Some 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 flexibility  Pension 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 community  Positive action committee- to promote inclusion and diversity and monitoring action on its active ageing project  Retired 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 transfer  Banking 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 organised  Need 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 practice  Bite sized chunks on active ageing  Short videos  Practical tools  Resources for different audiences (employers, unions, local reps  Knowldege sharing between union reps and managers- sharing experences and providing support to one another.  Business case for decision  Ammunition for persuading senior manager  Promoting employee consciousness of health issue |  | Awareness raising on the importance of active ageing  How to motivate workers socialised to early retirement  Explanation of active ageing in connection with productive work environments  Most relevant regulations and public policies  Tools for introducing culture of active ageing in workplace  Practical tips for personal care as people grow older  Examples of increased awareness of importance of active ageing  How other companies have started dialogue on active ageing  Measures against age discriminination  Insprirational case stuies  Motivation of older workers as a topic  How active ageing is being financed |  | Business case approach to active ageing  Awareness raising  Practical tools for developing active ageing  Ways to encourage older workers to plan for their work and retirement  Examples from other countries  Community of practice- sharing learning between organisations |  |