**Active Ageing through Social Partnership and Industrial Relations in Europe (ASPIRE)**

**Synthesis Report of Desk Based Research and Empirical Evidence (first draft)**

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**Active Ageing through Social Partnership and Industrial Relations in Europe (ASPIRE)**

**Synthesis Report of Desk Based Research and Empirical Evidence (first draft)**

1. **Introduction and Explanation of the Project**

Active Ageing through Social Partnership and Industrial Relations in Europe (ASPIRE) is a project undertaken by Newcastle University / the Centre for Research into the Older Workforce (CROW), ADAPT (Italy) and the universities of Granada (Spain) and Lodz (Poland). The aims of the project were clearly set out in the formal application to the European Commission *Directorate General for Employment Social Affairs and Inclusion* in July 2016[[1]](#footnote-1). The application set its aims as follows:

*“… 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. European social partners have developed programmes to support older workers delay retirement including for example the Working Longer Review of the UK National Health Service and our aim is to understand how Industrial Relations (IR) systems can facilitate and/or inhibit such agreements.”*

The application for funding argued that the research was timely, in light of pressure on European governments to address issues of ageing demographics, inclusive labour markets, the need for healthy workplaces for older people with activity limited health issues and pension reforms. A further factor, not mentioned in the formal application for the grant, was the conclusion of a [“European Social Partners’ Framework Agreement on Active Ageing and an Intergenerational Approach,](https://www.ceep.eu/wp-content/uploads/2017/03/Without-signatures_Framework-agreement-on-active-ageing.pdf)” finalised on the 8th March 2017 (*after* the commencement of the project). This agreement notes *inter-alia,* that “measures need to be implemented…at national, sectoral and/or company levels, to make it easier for older workers to actively participate and stay in the labour market until the legal retirement age...,”

Among other things the framework agreement mentions “tools and measures” to be taken into account by HR managers and social partners, “in the context of national demographic and labour market realities.” In fact the agreement contains little detail on the said tools and measures and whilst these may be forthcoming, the ASPIRE project may be expected to fill a need in this respect.

* 1. **Orientation of the project**

It will be clear from the foregoing, that the ASPIRE project is not purely a *research* project, but rather a project with a social change dimension. Whilst our evidence gathering has been academically rigorous, a principal aim has been to create *practical* resources which may be used to support changed approaches by employers and trade union bodies in the respective partner countries / industrial relations systems. Hence, the project has sought to identify effective negotiating strategies which can be shared and promoted through the use of effective educational and training resources based on the most useful examples found.

Box 1 below summarises these practical, action oriented aspects of the project.

**Box 1: Extract from Page 18 of Funding Application July 2016 (Short Summary of the Action)**

• Produce a qualitative dataset with rich information from key players in industrial relations informing an appreciation of age inclusive employee management,

• Identify the attitudes and organisational behaviours relating to active ageing of a representative group of social partners,

• Identify the attitudes, negotiation patterns and behaviours relating to active ageing of a representative group of social partners,

• Identify the attitudes, understanding and potential behaviour relating to age diversity, lifelong learning, healthy workplaces, and work and retirement plans of employees in different sector,

• Develop a one day training module for workplace level social partners to start a dialogue on ageing demographics

• Develop a web based tool for social partners to find resources to support the promotion of active ageing strategies.

* 1. **Other European Research into active ageing:**

Leaving aside the foregoing, the ASPIRE project has also sought answers to a sequence of research questions. This research aspect of the project (explained more fully below) is complementary to the social change purposes already outlined.

A number of other European Union supported projects on age, work and health have contributed to the development and dissemination of knowledge in this area. Examples are as follows:

* Mobilising the Potential of Active Ageing in Europe (MOPACT) set out to collect evidence to ensure that the ageing populations of Europe could be seen as an asset to society and the economy.
* The European Innovation Partnership on Active and Healthy Ageing (EIP on AHA) has sought to support various local and regional pilot health programmes and a multitude of collaborations.
* Smaller projects such as WORKAGE have sought to examine very closely the impact which could be made by targeted employer interventions and tools to implement and measure active ageing.

Hence it is hoped that the ASPIRE project will complement these and other projects sponsored by the European Commission, exploring the role of social partners in delivering more age friendly workplaces and providing tools to employers and unions in doing so.

* 1. **The Research Dimension of ASPIRE**

In countries like Germany, Finland and Sweden, collective agreements have been reached at sectoral and organisational levels on workplace ageing. However, these are countries with formal structures for negotiating and embedding collective agreements across industrial sectors. The four countries in which ASPIRE is being run have weak and/or fragmented labour political structures for employer coordination. Hence, the ASPIRE project has sought to investigate how far and in what ways social partners can work together in developing and embedding active ageing approaches to work in absence of such strong, unifying structures.

The research questions which the project set out to answer are summarised in box 2 below.

**Box 2: Extract from page 18 of the funding application July 2016 “Specific Objectives / Research Questions”**

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?

1.5 Methodology

The project has gathered evidence from:

* Desk research
* Workshop discussions
* Interviews with key stakeholders
* Discussions with trade unions and employers organisations outside the formal workshop structure
* Analysis of all of the above under selected themes (“thematic analysis”)
* International comparisons with participant countries in the project

The methodology is explained more fully under the following headings:

1.5.1 Workshop discussions:

A series of workshops was held in each of the partner countries, with participants drawn from social partners (employers’ organisations and trade unions). The workshops were typically two to three hours in duration. Participants numbered from four or five people in the smaller workshops to around twelve in the larger workshops. A full list of the workshops in each partner country is given in appendix 1.

All workshops and interviews were planned to follow a defined format, which was in practice flexibly implemented. The workshops and interviews were held with the purpose of exploring the attitudes and experiences of participants towards ageing, work, health and a range of issues which might impact on the readiness or ability of workers to continue working up to or beyond current retirement ages in their respective countries.

Workshops were professionally facilitated by the partners (all being experienced university or higher education tutors/ lecturers) with structured, pre-prepared questions following an agreed protocol, but with flexibility given to the presenters to deviate from the protocol and follow interesting leads. All workshops and interviews were audio recorded. Similarly with the single person interviews, a formal interview protocol was produced ensuring consistency in the questions asked. Again, flexibility was afforded to the interviewer to deviate from pre-planned questions to follow up interesting leads. Informed consent forms were completed and signed by all participants and interviewees, with full explanation of the purpose of the research and the condition of anonymity, the right to opt out and opportunities to correct any inaccurate statements attributed to them. Appropriate standards for ethical research were adhered to throughout the project.

Workshops held outside the formally planned sequence generally followed the same pattern, though as these were generally of an “opportunistic” nature, more variation was needed. (For example, one informal discussion took place with a team of some twenty managers attending a senior management team briefing in the UK tele-communications company K-Com, with the introduction given by the Managing Director and senior managers participating in a *rapid fire* opinion giving session. This was recorded and provided interesting insights.)

1.5.2 Interviews with key stakeholders:

*A series of interviews were undertaken by each partner. These were audio* recorded and in a few instances videoed. (All such recordings as well as summary reports assembled at the level of individual countries, constitute the evidence base collected by the project.)

1.5.3 Discussions outside formal workshop structure

Each of the partner organisations is intensely engaged in industrial relations / HRM research in their own country, as a result of which they have opportunities to meet practitioners, union officials and other stakeholders frequently. Multiple discussion opportunities occurred during the course of the project to participate collaboratively with social partner organisations and these opportunities were mined for further data or to explore opportunities for additional workshops. A list of some of these discussions and informal exchanges is given in appendix 2.

1.5.4 Qualitative research methodology

“Qualitative research methodology seeks to provide answers to research questions, systematically uses a pre-defined set of procedures to answer the questions, collects evidence, produces findings not determined in advance and which are applicable beyond the immediate boundaries of the study”.

1.5.4 Thematic analysis

Recordings of workshops and interviews were transcribed into written text in their home languages (English, Polish, Spanish and Italian). The partners in the project then coded the transcripts cutting and pasting significant sections of each transcript into a spread-sheet collection of themed “nodes” using *NVivo 11* software. These coded transcripts then provided the basic material for the thematic analysis. Key nodes for the analysis were as shown in appendix 5, which replicates the structure of the coding tree used in all countries.

Each national team was given responsibility for producing a report based on their own transcriptions of workshops and interviews, with the expectation that they would reproduce sufficient direct quotes from each workshop to provide colour and context for their national report. Reports based on these transcripts were prepared and translated into English. Where required, the transcripts were also translated into English for the purpose of compiling this consolidated (all country) report of the workshops and interviews.

1. **Desk Research – Summary of Findings**

Responses to the five research questions (box 2, page 3) may be briefly summarised as follows from our desk research.

Question 1: How do different industrial relations structures in the participating countries facilitate and/or inhibit the spread and impact of collective agreements on active ageing?

The four countries represent a diversity of business systems which may be characterised as: *state organised* (Spain); *mixed market* (Italy); *post-communist* (Poland) and *arms-length institutional* (UK). In two of the countries (Poland and the UK), the state takes a light-touch approach to regulation, while in Spain and Italy, coordination by institutions is high and centralised. Other features of the industrial relations systems in individual countries which might have been expected to be found reflected in evidence gathered in workshops and interviews are as follows.

*Italy – Voluntarism and Fragmentation:* In Italy, there are systems for collective bargaining at the national and sectoral levels on workforce issues including age. In the case of Italy, adherence to sectoral level collective agreements is loose and embodies a strong element of voluntarism whereby individual firms in the same sector may deviate from the main agreement. This has led to fragmented approaches to sector based age management, with multiple variations at enterprise level.

*Spain – Formalised Role of unions in Public Policy:* In Spain, unions have a formalised role in setting, implementing and monitoring public policy via collective bargaining and bilateral structures at the national, regional and sectoral level. These structures mean that employment policies are implemented in non-uniform ways, showing an element of divergence and originality according to the needs of regions and sectors. Social partners have some influence over HRM practices. The Spanish report highlighted the ways in which social partners have influence over regional level active ageing programmes. However, workplace ageing is rarely mentioned within regional programmes.

*Poland – Collective Bargaining Mainly at Employer Level*: In Poland, the main union movement, Solidarsnoc, has close political ties with the current government and strong influence over national public policies, including pensions and retirement. Collective bargaining is primarily at the employer level and, since 2006, collective bargaining structures have been complemented by works councils at the national, regional and organisational levels. Works councils in Poland incorporate non-union voices on employment issues

*UK – Diverse mix of State and Private Sector Approaches:* The UK industrial relations system is segmented between public and private sectors. Public sector industrial relations are governed by Whitley Council structures which feature national collective bargaining (although there are devolved pay bargaining structures in the Civil Service and parts of local government) and workplace level consultative bodies. Private sector industrial relations are fragmented with some sectors (e.g. hospitality and retail) having very low levels of union membership.

The reports highlighted different ways in which formal and informal collective bargaining structures are transforming the ways workplace ageing are discussed. In Italy, bilateral bodies (workplace level decision making bodies) have been used to support employment based social welfare including training, health and safety interventions, health insurance and income support. It has been noted that such bodies can be used to deliver active ageing interventions and support intergenerational solidarity, though the country report emphasises that such examples are found in only a *minority* of instances.

In the UK, Local Enterprise Partnerships (LEPs) are voluntary organisations made up of local government representatives, employers and other stakeholders and tasked with setting regional economic priorities. Responding to Government pressure, some LEPs have identified responses to the ageing workforce as a local economic priority. Our research revealed two LEPS in the North East of England which have assembled working groups made up of unions, employers, and other stakeholders to develop regional plans for addressing issues around joblessness, skills, and healthy workplaces. Again, the impact of these initiatives seems as yet restricted to a minority of enterprises, though there may be potential for greater impact in due course.

Question 2: How are age and employment perceived in workplace contexts within different IR systems?

Our observations based on the initial desk research helped us to conclude that workplace ageing is a mid-level priority in two of the countries (UK and Poland) and a low priority in two (Spain and Italy). Perceptions of age are influenced by the following identifiable factors:

1. Labour and skills shortages
2. Training and skills opportunities for older workers
3. Changes in pension age
4. Closure of routes to early retirement
5. Government policies and priorities
6. Mandatory retirement
7. The changing nature and structure of pensions

The above points will now be considered in order.

a. *Labour and skills shortages*: In two countries (the UK and Poland), labour and skills shortages were mentioned as drivers for employer efforts to retain their older workers and encourage later retirement ages. Migration has also come into play, with British employers recognising the political limits of using migrant labour as a way to address shortages and Polish employers facing high levels of emigration of younger workers. While Spain and Italy have faced relatively high unemployment rates, these have now plateaued. With economic growth returning, some employers in these countries have concerns about potential shortages, especially in sectors where recruitment was frozen during the 2008-2010 recession and where workforces are older with large cohorts near to retirement.

b. *Training and skills:* The reports discussed skills and qualifications within the context of knowledge sharing and intergenerational support. Training opportunities for older workers are less available in all countries than for younger staff and few bespoke programmes for retraining were mentioned in any of the country reports. The UK report discussed the Union Learn programme and role of learning reps in identifying workforce level skills needs. It also discussed the Mid-life Career Review: a pilot programme to offer universal career advice to people at or around the age of 50. The Italian report suggested that bilateral agencies could play a role in delivering mid-career training.

*c. Changes in pension age*: In all countries the age of entitlement to state pensions has been changing. In Italy and Spain, second tier pensions delivered by the State and pension ages are now 67. In the UK state pension age has been rising for women since 2010 and is now the same as men’s at 65. State pension age is now progressively rising to 66 by September 2020 with further steps to 67 and 68 planned. In contrast, the Polish government has recently *reversed* plans to raise pension ages to 67 for both sexes and they remain at 60 (women) and 65 (men). In the UK, public sector pension ages have generally been linked to the state pension ages. Recent changes in state pension ages have therefore been a force driving increased ages for employment linked pensions. (This is seen, in particular in the National Health Service, where a Working Longer Review Group has considered the wider implications in terms of employment conditions.)

*d. Closure of early retirement routes*: State funded early retirement routes still exist in Italy and Spain, but since 2006, such routes were closed in British public sector pension schemes (and there have not been state sponsored early retirement routes since 1989). Access to early retirement routes have in the past shaped the drive towards workplace active ageing initiatives, aiming to *discourage* workers from exiting the workforce prematurely. In Spain, for example, the numbers taking up of early retirement programmes remain much higher than those opting for phased or late retirement benefits.

*e. Government priorities*: Government policies in all four countries are generally promoting active ageing, but there is some variation to the extent to which workplace active ageing is part of an overall framework for supporting older people in social and economic engagement. The UK government has gone furthest of the four with a government policy, *Fuller Working Lives,* setting out an overall framework for extending working lives. Regional and national programmes in the other three countries are being developed. However, priorities are mainly focused on other social issues such as social inclusion, health, and eldercare.

*f.* *Age discrimination regulations*: All of the member states have transposed the Employment Equality (Age) Directive 2001 but in substantially different ways and with different emphases. In all four countries, legislation on age discrimination has been consolidated with other discrimination laws. In the case of the UK, government explicitly sought to consolidate equality laws to address issues of intersectionality. In both Poland and the UK, there was a transition period to adjust to the regulations. In the case of the UK, there was a five-year interim in which mandatory retirement at 65 (“the Default Retirement Age”) was lawful (see below). Employers in Italy and Poland are permitted to use age as a criterion for redundancy selection while in the UK, employers are permitted to offer enhanced redundancy payments for older workers within certain limits.

*g. Retirement ages:* Two of the countries (UK and Spain) have abolished mandatory retirement for most workers. In Italy, workers can delay the date at which they start to draw their pension in which case their contracts cannot be terminated. In Poland, the employment contract is terminated upon the employee reaching pension age but can be extended with agreement with the employer. Employers in all four countries are permitted to use age as a factor in management decisions so long as the action is a proportionate means of achieving a legitimate aim.

*h. The changing nature and structure of pensions:* In three of the countries (Spain, Italy and Poland), defined contributions (DC) pension schemes are delivered and managed by the State whereas in the UK they are managed by employers. In Spain, individual retirement accounts are becoming an increasing part of retirement savings. Because DC pension arrangements generally put the financial risk of retirement savings on the individual worker, unions, especially in the UK, are seeking ways to support older workers who need to delay retirement, whether by choice or due to insufficient retirement savings.

Question 3: How do employers and trade unions respond to EU and national social activation policies in creating sustainable work opportunities for older workers?

In our desk research, all four reports noted that joblessness amongst older people is higher than in the overall population, although each also highlighted the high levels of youth unemployment- a problem which was discussed fully in the Spanish report. The following points summarise our main findings in relation to national and social activation policies and work opportunities for older people.

*a. Programmes to support older people back to work:* There are various modest programmes which are available to support older jobless into work. In Poland, government subsidises pension contributions for people 55+ who are out of work (the UK also provides pension credits for the unemployed and people who are out of work because of caring responsibilities). Spain has a programme for encouraging retirees to return to work by offering some pension flexibility, although take-up is quite low. The Italian government provides some tax incentives for organisations to hire older job applicants, such as suspending social security contributions. The Italian report also points to the role of bilateral institutions in delivering income support to jobless and resources like training and job placement to get them back into sustainable work. No country has a specifically tailored welfare to work programme aimed at older job seekers.

*b. Reskilling and retraining older workers:* Reskilling opportunities for older workers are limited in all four countries. In the UK, government sponsored apprenticeship programmes have been extended to older apprentices, though the term “older” should be read advisedly – “adult apprenticeships” are for people over the age of 25 and much of the discussion about older apprenticeships relates to this age. Some employers have used apprenticeship funding to provide training (largely for existing staff) which would normally be provided through organisational funding and the description of it as “an apprenticeship,” is problematic.

*c. Early retirement programmes:* Early retirement remains an available option in two of the countries, Spain and Italy. In both cases the option is reserved for people who are unemployed or at risk of unemployment. In the case of Spain, it is reserved for employees who are within two years of retirement and in Italy, for employees who are within four years of retirement and have been unemployed for four years. Early retirement in both cases means that employees can start to draw their pensions. Neither Poland nor the UK governments provide state early retirement benefits. However, in Poland, workers can draw down a reduced DC pension, while in the UK, employers can offer early payment of an *occupational pension* (not state pension) to employees over the age of 55. This sometimes happens during a redundancy (as some UK public sector organisations have done). Employees who wish to retire early on grounds of ill health may sometimes do so before the age of 55.

*d. Support by social partners:* Social partners in some countries are actively involved in supporting members, both those in and out of work, to maintain their employability. The UK’s largest union, Unite, has tried to recruit and represent unemployed people. UK unions’ support for learning through *TUC Union Learn* and the learning programmes of individual unions, is to a substantial extent driven by the knowledge that learning and skills are a key means through which employability may be preserved in the event of job losses. The Italian report also cited many sources that argue in favour of an intergenerational approach to employability in order to address both younger and older unemployment such as introducing knowledge management systems for older workers to pass on knowledge to younger workers.

Question 4: How are the interests of older and younger workers negotiated and reconciled through workplace level mechanisms?

None of the country level reports were able to identify existing intergenerational programmes being carried out by social partners. However, promotion of intergenerational support was mentioned in government programmes in Spain and Poland and as a potential for social dialogue at the sectoral level in Italy. The following examples

*a. Intergenerational conflict or solidarity?* Intergenerational issues have shaped employer and union attitudes to active ageing. The Spanish report noted that persistent high youth unemployment has been a priority for social partners and older workers have explicitly and/or implicitly been persuaded to retire early in order to make way for younger people. (See section below for further comment.) In the UK, many unions have advisory committees or interest groups for younger and older workers, which exist to advise on specific older / younger workers’ issues and support campaigns around their respective interests. Matters of inter-generational inequity may be debated here, but there is as yet little sign of this impacting on the collective bargaining agenda.

*b. Do older and younger workers compete in the job market?* There is a common view that by remaining in work longer, older workers may reduce employment opportunities for younger workers. Economists have long described this as a fallacious model (the “lump of labour fallacy”) and Governments, employers and most unions appear to accept this rejection. Hence, in the UK, most trade unions and employers are sceptical that older workers are, “stealing the jobs of the young.” Nevertheless, the “lump of labour theory,” (if it can be called this - as opposed to *fallacy*) contributes to shaping some workers’ attitudes to extended working life and similarly *some* management practices. Objectively, the idea has less traction in the UK in any case, as the external labour market has generated full employment and mitigated the extent to which older workers have created bottlenecks for younger workers’ career progression. On the other hand, this may be less the case in other countries. For example, the belief that when older workers remain in work they, in effect *steal the jobs of the young,* seems to be widely held in Spain and Italy – countries where youth unemployment remains an enduring problem.

c. *Intergenerational knowledge exchange and learning:* An element of intergenerational learning is an essential and natural part of any vocational training activity. Workplace practices and (less frequently) developed programmes make use of the potential for intergenerational knowledge exchange. The Italian report cited a number of scholars who have suggested that bilateral bodies could be used to support intergenerational learning and restoration of employability. It is argued that older workers, especially those wanting to phase into retirement, could be redeployed to train younger workers, especially those who have been, or are at risk of being unemployed. Such programmes could present pathways to sustainable work for both generations. For older workers, training younger workers could provide pathways out of physically demanding work and for younger workers, it could provide the chance to upskill and transition into permanent work. In our empirical evidence section we will discuss some practical examples of this idea in action.

Question 5: How are good practice and innovations in the dissemination of active ageing approaches shared between and within different national contexts and in Europe?

We have identified the following ways in which knowledge and practice of active ageing approaches are being disseminated currently.

*a. Regional and sectoral platforms:* One of the emerging themes of all four reports is the emergence of regional and sectoral bodies as platforms for developing and supporting workplace active ageing programmes. In the UK, Local Enterprise Partnerships in the North have been developing programmes (involving Northern TUC, CIPD and local employers) to take a joined-up approach to tackling older joblessness and skills shortages as well as to bid for resources to implement the Government’s *Fuller Working Lives* strategy. In Spain, social partners are collaborating both on active ageing (though with less of an emphasis on work) and economic development. The Italian report noted that regional variation of employment law occurs and, although sectoral based collective agreements exist at the national level, regional differentiation can occur through activities of bilateral institutions. Finally, the Polish research team is working with locally based social partners to deliver tools for small and medium sized enterprises.

*b. Public policy and collective agreements:*  All of the reports discussed the fragmented way in which public policy and collective agreements have influenced organisational HR practices at the workplace level. Because of relatively weak vertical integration in all four countries, employers have a great amount of discretion over whether and how to introduce active ageing HRM practices. The ‘business case’ for supporting older workers is therefore an essential incentive for organisations to act. In the case of Spain, few businesses have seen a persuasive case for acting, given the high level of youth unemployment and surplus labour. (On the other hand, this context has been less effective in persuading employers to recruit unemployed people). Volkswagen in Poznan (Poland), for example, has adapted its assembly line in order to mitigate physical strain for factory workers while Barclays has introduced an apprenticeship programme to encourage older people to make a job change into retail banking. In both cases, drivers for change have included business arguments – to support quality measures in the case of Volkswagen and to transform the customer experience in the case of Barclays.

*c. Sector level agreements/ initiatives:* The Italian report referred to sectoral based collective agreements on work longevity (though not specifically based on age) in the chemicals and transport sectors. These include programmes on health, training and flexibility. The UK report discussed the creation of an National Health Service (NHS) Working Longer Review Group which is an industry (joint union and employer based) working party to review the impact which higher pension ages would have to the delivery of health services. This has produced multiple outputs including an age awareness toolkit to help organisations plan their readiness for the opportunities of an ageing workforce, guidance on use of the NHS pension, a library of research and websites to help employer and union representatives to understand the challenges of an ageing workforce, quick guides and posters, to mention only some. (The working longer review group reported directly to the NHS staff council – a joint employer and employee body – so there was joint ownership of the process throughout.)

Hence, it will be seen that whilst the coverage of joint initiatives on active ageing across sectors is presently thin and patchy (even where it is best developed) some effective and interesting examples do exist which could potentially serve as models of good practice going forward.

1. **Empirical Research – Summary of Findings Across the Partner Countries**

**(section to be revised and reviewed in light of completed section 4)**

Each participating country has produced a report of its findings from the workshops and interviews which constitute the empirical element of the ASPIRE project. For a full understanding of the substantive findings in each country and for an informed discussion of these in each country, the reader is directed to these country level reports. This synthesis report has drawn extensively on the recorded comments and discussions *and* the informed impressions of our research team to convey in some detail a comparative, qualitative overview of the position in the four countries. We will identify common themes and striking differences emerging in bringing together the country level evidence reports in section 4. To achieve this we will loosely follow the thematic analysis structure (as shown in Appendix 5). We will illustrate our comparative discussion with extracts from the workshops and interviews from each country. In the present section (section 3) we provide a summary and overview of the findings across all countries.

**3.1 Summary of Barriers and Facilitators to Active Ageing**

*3.1.1 National Orientations and Levels of Awareness*

Taking the four countries together, our workshops revealed a low level of awareness of “active ageing” as a concept or term of art. There were differences, in both the level of understanding and significance which participants attached to the idea of “active ageing,” including country level differences (as shown below) and in some cases the precise *meaning* of the term *active ageing* was a source of confusion.

Spain: Our Spanish partners noted a very low level of awareness of active ageing among participants in the Spanish workshops.

Spanish report *“In effect, one undeniable conclusion that can be drawn from our workshops is that there is no awareness of the question of ageing. It is safe to say that the topic of active ageing is practically absent from company agendas. We know of only a few companies in which this is not the case.”* ”

The partner reports, *“What normally happened at each workshop was that just taking part in it allowed the participants, at least momentarily, to realize that there is an issue – ageing – that is more present than they had perceived in their ordinary day to day activity. Naturally the raising of awareness should be a first step, followed by the establishment of action strategies on the issue.”* (A.15)

Italy: Our Italian partner reports that many of those attending the Italian workshops seemed generally enthusiastic about the idea of active ageing. Others were less confident and somehow uncertain about existing active ageing policies. The overall impression was that, although the promotion of active ageing is not among the priorities of social partners in Italy, the issue is starting to be considered following some pressures from their members (both workers and companies). This is (reportedly) in line with the traditional Italian logic of collective action, according to which trade unions and employers’ associations’ strategies are shaped and influenced by problems emerging at the shop floor. Social partners recognise that active aging is an issue of considerable concern, but it needs time to go on top of their agendas. Our partner comments that, “This is also why active ageing measures in collective agreements are still scarce.”

Poland: Polish popular understanding of the need for active ageing and extending working life is influenced by opposing tensions. Reports from our workshops told two stories: one of recognition of the inevitability of an ageing population leading to an extension of working life and some evidence of employers and unions collaborating in attempts to make working longer possible. The other, a tale of some confusion particularly as the Government has adopted uniquely divergent policies regarding retirement, from the rest of the EU. The following statements from the Polish workshops contrast these two sides of the coin. In the first statement the contributor states the conventional, “received wisdom” position, recognising the inevitability that living longer must entail acceptance of a longer working life

Social Partner: “*…the awareness of all the people is slowly changing. Everyone realizes that they will have to work longer because we live longer. Our society lives longer and longer.”* (PL\_WSP\_5).

In contrast, another employer believed that there was little that employers could do to influence the decisions people took around retirement:

*“Extending the retirement age. Employers have very little influence on this matter. They have an indirect one, but it is a government matter.”* (PL\_WSP\_2)

The Polish report too, questions whether older employees in Poland are in fact *ready* to extend their working lives. Our Polish partner observed,

*“No unambiguous perception of the potential readiness of older workers to extend their working lives can be noted…”*

Recent Government decisions may have sown the seeds of confusion among the general population. Despite Poland’s 38 million population being among the most rapidly ageing in the EU, giving rise to an objective need for Poland to adopt policies supporting active ageing if the full economic potential of its people are to be used, reforms in the area of pensions and retirement do not command cross party support. In fact, in 2017 Poland’s ruling Law and Justice Party (PiS) reversed previous decisions to raise state pension age for both men and women to 67 and instead implemented a new retirement age of 60 for women and 65 for men. This gender differential puts Poland on a limb of isolation compared with other EU countries and may lead to the Polish Government facing a legal challenge to its continuing inequality in retirement / pension ages. The state pension agency ZUS has estimated that 331,000 people could take advantage of the option to retire earlier.

On the other hand, our workshops produced evidence that the social partners are more pragmatic over the issue of retirement age. The Polish report states:

*“Both representatives of employers and trade unions emphasized the situational character of the individual factors (leading to earlier retirement). They pointed out that most often the decision about leaving employment is made by the employee due to their health, mental and physical condition, opportunities of further earning and ways of spending their free time.”*

UK: Participants in the UK workshops seemed broadly familiar with the facts around demographic change and the ageing of the workforce. They were aware of the main legislative changes on age discrimination and the end of mandatory retirement. Once the ideas had been explained, there was little challenge to the idea that *active ageing* is a self-evident “good*”.* On the other hand, there were differing views on the questions of how well placed workers were to age actively and how supportive employers were of older members of the workforce, both in and out of employment. Participants recognised that views on “old age” had changed somewhat over recent decades. Employer and employee groups broadly agreed that society had benefited from developments in medical science, diet and the quality of social and working life and acknowledged the impact of these changes to health and life expectancy. They acknowledged that governments of advanced countries had raised state pension ages in recognition of the increase in healthy life expectancy. Hence, a societal wide narrative in relation to the ageing process appeared broadly uncontentious.

A theme running through a number of the interviews and workshops in the UK was that employer adaptations to the ageing workforce had largely centred upon complying with legislation against age discrimination.

UK synthesis report: *“The term ‘active ageing’ was recognised but not widely adopted by either our union representatives or our employers. Policies explicitly described as pursuing an “active ageing” agenda were therefore unlikely to appear. On the other hand, there was evidence that employers from all our sectors had changed policies around recruitment and retention of workers to comply with the law (now prohibiting age discrimination) and to that extent it could be said that ‘active ageing’ policies are on the bargaining agenda.”*

That said, whilst comprehensive rafts of age management policies were not much in evidence, there were numerous reports of piecemeal changes introduced to deal with one issue or another directly traceable to the ageing of the workforce. In the financial services sector, a union rep explained how the employer had adopted a version of a flexible working policy specifically to give employees with caring responsibilities for elderly parents the possibility to take time out and provide care or other support.

1. **All-country comparison through workshops and interviews**

In order to facilitate an objective and consistent over-view of the empirical evidence in the form of workshops and interviews from the four participant countries, a structured questionnaire was produced to which researchers in each country were invited to respond. This was primarily to encourage a full record of workshop and interview evidence and crucially, to capture the impressions gained by insightful consideration of the workshops and interviews. The questionnaire was drafted after examining the national evidence reports from each of the four countries for similarities and common threads (or contrasts). It was hoped that these could be confirmed or refuted and better understood by a closer inspection of the evidence. The following section will therefore bring together the observations of researchers (based on their sense of the qualitative evidence) supported by direct quotations made by workshop participants.

* 1. Awareness of active ageing

The World Health Organisation definition of active ageing refers to it as, “the process of optimizing opportunities for health, participation and security in order to enhance quality of life as people age.” Walker defines it as, “A comprehensive strategy to maximise participation and well-being as people age (which) should operate simultaneously at the individual (lifestyle), organizational (management) and societal (policy) levels at all stages of the life course”. Researchers were asked: “How strongly would you rate the level of awareness of active ageing among the attendees of workshops and interviewees from your country?” The following assessments were made:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | High awareness | Modest awareness | Very little awareness | No awareness |
| Italy |  | X |  |  |
| Poland |  |  | X |  |
| Spain |  |  | X |  |
| UK |  | X |  |  |

Overall, in all countries, the workshop participants demonstrated “modest” or “very little awareness” of the concept of “active ageing.” Nevertheless, in a looser, less coherent way, there was a degree of awareness of the challenges facing older people as they remained in the workforce and the fact that active ageing *per se*’ was not being addressed, as the following comments illustrate:

Spain: Trade Union rep, private sector, individual interview: *"It is not a daily issue neither in companies nor in the sector where I work".*

Human resources manager, public sector, workshop "*... I have been in this company just a few months but I have worked in other companies, in other groups. Unlike other groups, I perceive that there is no special sensitivity around active ageing, which concerns me because the average age of the workforce in the company is already rising".*

Italy: Our Italian researcher commented that, “*Many people interviewed and involved in the workshops seemed generally enthusiastic about active ageing. Others were less confident and somehow uncertain about existing active ageing policies. The overall impression was that, although the promotion of active ageing is not among the priorities of social partners in Italy, the issue is starting to be considered following some pressures from their members (both workers and companies). Social partners recognise that active aging is an issue of considerable concern, but it needs time to go on top of their agendas. This is also why active ageing measures in collective agreements are still scarce.*”

This ambivalence and incipient awareness is reflected in the following comments from workshop participants.

Employer Rep (Rome): *“Unions agents or workers representatives often are not aware of challenges and opportunities of an ageing workforce, or they tend to see them as secondary….Our association is not fully aware that single policies on working time flexibility or health assistance can be associated with a broader active ageing policy”.*

Poland: Researcher’s observation: *“I noticed low awareness. Workshop participants declared that they knew (about active ageing), but as the discussion went on, they could not give details. Trade union organizations at the central / national level are familiar with the topic. On the other hand, trade union and company committees have very little awareness of the issues involved.”*

Trade union rep, (union workshop 2): *“This is my first encounter with the term ‘active aging in the workplace.’ …Where does the term come from? What do the social partners do at work? Do they have to force the employer to work out a network of employment based on age and experience of employees? Do you introduce such activities (both in the workplace and outside), so that age does not determine the suitability of the employee?*”

UK: Attendees (both management and unions) were acutely aware that more people were working later, that they now have the option of working beyond 65 without being obliged to retire and that the architecture of both state and occupational pensions provision was shifting so that they would be *expected* to work longer before retirement. There was strong awareness too of the challenges of remaining healthy in order to remain economically active.

Rep (NHS, Local Government and not for profit sector): *“…you know, we can’t physically do it until we’re 60, because it’s so demanding… it is back-breaking.*

Rep (Construction sector): *“It’s a physical job. As long as you’ve got your health and your wellbeing, you can go on working. And a lot of them are not. They’ve been working, they’ve got arthritis and they have to work all weathers, carrying heavy loads, and their bodies are not in the shape to work.”*

* 1. Awareness of framework agreement

**Framework agreement (opening paragraph):** “… measures need to be implemented, where necessary at national, sectoral and/or company levels, to make it easier for older workers to actively participate and stay in the labour market until the legal retirement age,” and further comments..:

“Measures should be aimed at significantly improving the ability of workers of all ages to stay in the labour market, healthy and active until the legal retirement age, as well as strengthening a culture of responsibility, commitment, respect and dignity in all workplaces where all workers are valued as important irrespective of age.”

The relevance of the framework agreement may be readily understood from the above quotation. Our workshops showed there is a lack awareness of it and therefore a lack of understanding of the agreement’s potential benefits. The following table reflects the impressions of our researchers of their workshop participants.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | High awareness | Modest awareness | Very little awareness | No awareness |
| Italy |  |  |  | X |
| Poland |  |  | X |  |
| Spain |  |  |  | X |
| UK |  |  |  | X |

*Comments and quotes from individual countries:*

Spain: Workshop facilitator: *“Do you know other policies? For example, in March 2017 there was a European Agreement between unions and employers.”*

Answer: *“In our company this has not been applied”* (trade unionist, public sector, workshop).

(Throughout all four Spanish workshops nobody mentioned the framework agreement.)

Italy: The issue was not discussed.

Poland: The participants of the workshops usually did not know about this initiative at all. The exception was the national committee of the union Solidarity, which organized a dissemination seminar for its members in April 2018. Members of other unions as well as employers’ organisations and policy makers were all invited to take part. Attendees included national and foreign experts from countries representing different systems of social policy and different cultural contexts as well as trade unions, employers’ organisations and representatives of company committees from across Poland. The meeting included short presentations and longer discussions and allowed an exchange of experience and good practices as well as active participation by attendees. In this way conversations were able to consider the broader context.

UK: Workshop facilitator’s comment: One may gauge the lack of awareness of the framework agreement, by the failure of participants to mention when it would have provided a useful supporting argument to their case. The ideas it contained received no acknowledgement from union reps or employers, even though their discourse was often entirely in line with the agreement, as is illustrated in the following workshop quotation.

Rep (Construction workshop): *“At the end of the day, it is a physical job, even for fit, young men. I know when I was grafting, you came home whacked, do you know what I mean? God knows what it’s like, you know, add 20 years on me or 15 years on me. I’d be proper struggling. That is the main issue. And it’s a case of, from what I can gather, I might be wrong, they’re not going to reduce the workload, I don’t think…They might try and give them easier jobs, but the work is* *the work and that’s what they expect. So, it is going to be an issue, going forward, your age.”*

* 1. Perceptions of active ageing as a long term issue

Our researchers were in agreement that participants saw active ageing as a long term issue, as is reflected in the following table:

|  |  |  |
| --- | --- | --- |
|  | Agree – active ageing a long term issue | Disagree – active aging short term |
| Italy | X |  |
| Poland | X |  |
| Spain | X  But not always |  |
| UK | X |  |

*Comments on perceived long term nature of active ageing:*

Spain: Facilitator’s comment: Active ageing is generally but not always seen as a long term issue.

Union rep (public sector workshop) *"... active ageing has not been dealt with until now but we have to focus on it in the long term because, as I say, the staff is now around 45-50 years old”*.

Manager, private sector, workshop: *"And as for the issue of age and workers, it is true that it is not an issue that now concerns us much today, but we have in the agenda that we have to see how we are going to do it because right now our the company’s personnel is very young but yes it is true that in the short term we are going to find already with people of an age close to retirement".*

Italy: Our Italian partners did not specifically answer the question of whether active ageing was seen as a long term issue. Our researcher comments that responses to the EU policy call for social activation policies, had taken the form of sector level Intergenerational Solidarity Pacts. However, it is not immediately obvious that in the application of the said pacts, a longer time perspective is adopted either with regard to *ageing* per se or measures to promote *active* ageing. (Response drafted by CB)

Poland: No example given

UK: There was widespread agreement among the union reps and attendees in the management workshops, that the achievement of active ageing was a long term issue. This emerged with respect to the physical health aspect of ageing and also with regard to coping with pressure in the job and being allowed opportunities to retrain, or for the job tasks to be adapted in some way to adjust to the abilities and limitation of an older worker.

Union rep (aged 50, bricklayer): *“Personally, I’ve got severe back problems. I’ve got two vertebrae starting to crumble, third one is starting to crumble. I’ve got scar tissue across my back, sciatica and recently, last week, I found out I’ve got some arthritis in the bottom of my back as well, all due to the damage done when I was 17.* *Also, I think you’ve got the health side of things as well, the ageing workforce, where diseases come through. Occupational diseases like silicosis, asbestosis, stuff like that. All that stuff develops later on in life. I know one asbestos fibre lays dormant for 40 years in your lungs before it affects you.”*

* 1. Early retirement cultures

Employment Rates of Workers Aged 55-59, 60-64, 65-69 in 2016 (Source: OECD *Pensions at a Glance* 2017*)*

|  |  |  |  |
| --- | --- | --- | --- |
|  | 55-59 | 60-64 | 65-69 |
| Spain | 59.3 | 36.8 | 5.3 |
| Italy | 62.2 | 36.9 | 9.1 |
| Poland | 61.7 | 30.5 | 9.9 |
| United Kingdom | 73.4 | 52.2 | 21.0 |
| OECD | 69.6 | 46.3 | 20.9 |

The above table provides details of employment rates of workers in the three age cohorts shown, in 2016.

Effective Retirement Ages and Normal Pensionable Ages for Men and Women in Partner Countries 2016 (Source: *OECD Pensions at a Glance* 2017)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Men | | Women | |
|  | Effective | Normal | Effective | Normal |
| Spain | 62.2 | 65 | 62.6 | 65 |
| Italy | 62.1 | 66.6 | 61.3 | 65.6 |
| Poland | 62.6 | 66 | 59.8 | 61.0 |
| United Kingdom | 64.6 | 65 | 63.2 | 63 |

Researchers gave views on whether or not participants in their workshops manifested signs of an early retirement culture, choosing from the following descriptions.

|  |  |  |  |
| --- | --- | --- | --- |
|  | Signs that an “early retirement culture” prevails | No signs of an “early retirement culture” | A mixed picture – Some signs of “early retirement culture” but also the contrary |
| Italy | X |  |  |
| Poland | X |  |  |
| Spain | X |  |  |
| UK |  |  | X |

*Comments and observations on “early retirement culture:”*

Spain: Line manager (private sector, workshop) *“So far we have perceived or we have looked for ways to make someone leave the workplace before retirement. This doesn’t show an understanding of active ageing, but it just goes in the opposite direction".*

Worker (private sector workshop): *“The issue of age, especially here in our company, to tell the truth, everyone is dying to be 65 years old, or even 60, and leave. Since I've been here I have been thinking how much time do I have ahead to leave, I'm looking forward to leaving”.*

Union rep (public sector workshop): *“So we in our company have never put retirement on the table, only to take workers out of the way via early retirement and bring in new people, who also mean a much smaller economic burden to the company and that is also an added value”*.

Italy: Union Rep (Modena Workshop): “The banking sector, as part of the tertiary sector, is being *particularly affected by digitalization that implies bank’s restructuration and a higher number of redundancies. This phenomenon has been historically managed (in the last 15 year) by facilitating access to early retirement though sectorial funds, entirely funded by the companies of the sector”*

Employers’ rep (Rome Workshop 3) *“If legislation allows early retirement, companies will prefer to favour the exit of older workers that represent an important burden from the economic point of view, and hiring young workers by using economic incentives, without taking into the consideration the problem of welfare systems’ sustainability.”*

Poland: Facilitator’s comment: *“I confirm strongly the existence of a retirement culture. Pension entitlements cause people to leave their jobs as early as possible. Gaining retirement rights means everyone using them. The system is not stable at all (it has been changing a couple of times since the beginning of socio-economic transformation in the 90s) this way if someone can use their given provision even though it is low they just do it. This early retirement culture has been fixed by units driven by stereotypes (like company owners and managers) which apparently do not realize the benefits of employing the older person.”*

UK: The discussions in the UK workshops gave the sense that there is not now an “early retirement culture” in the way implied (i.e. of widespread expectations of early quitting supported by early pensions.)

**This panel currently describes some background facts on early retirement in the UK. If partners are able to add a few corresponding facts from their own countries we can use it as a composite picture for the whole project**

**Background facts on early retirement UK:**

Effective retirement ages in the UK fell from an average of 67.7 years (men) and 65.7 (women) in 1970 to 62.8 for men and 60.8 (women) by 1985. From these low points, average effective retirement ages climbed back to 64.6 (men) and 63.2 (women) by 2016 (OECD Estimates). Hence, for a period in the 1980s and 1990s there were many more people experiencing earlier exit from the workforce and it would be fair to suggest an early retirement culture had become established.

Today, one in four women and one in six men who reach state pension age in the UK have not worked since they were at least 55. By this measure, “early retirement” is still very widespread. However, early departures arise most frequently in response to *triggers*, such as declining health, the assumption of caring roles and redundancy. One may question whether early departures on these grounds are really “early retirement.” The reasons for early exit may involve unplanned or unexpected termination of employment, and a period of worklessness, which may in time come to be rationalised *post facto* as “retirement.”

Of the 50+ unemployed in September 2018, 37.7% had been unemployed for more than six months – suggesting that older people find it hard to secure suitable jobs. Sometimes they rationalise their position and describe themselves as “retired.”

While there is undoubtedly a core of people who genuinely *retired* early and there are others working who would still *like* to retire early, the financial incentives to retire are no longer widely available.

In the UK some 60 per cent of people retiring in 2017 were planning to retire *before* reaching state pension age. (Prudential Survey). But, given that the Government has abolished fixed or mandatory retirement ages a broader “ball park” retirement age now applies with people choosing the most convenient date to quit according to a number of factors. Retiring within this “retirement ball park” is not the same as the traditional concept of “early retirement” in which people often retired in their fifties.

Increasing numbers of UK citizens choose to work beyond state pension age - 1.2 million in September 2018. Some, experiencing the frustration to find work, may opt to describe themselves as “retired,” though this is a pragmatic choice rather than a “cultural” phenomenon.

Union rep, financial services workshop: *“You’ve got the older generation who’s been there possibly 20 or 30 years, and within the company…who have come past general retirement age…but their circumstances may be that they’re on their own now. They don’t have any family, so they come to work part time, because there are* ***people*** *at work. …They come into work because they speak to people, they see people, it’s social…they’re coming to work for their own reasons.”*

* 1. Barriers and facilitators of active ageing

4.5.1 Framework of social dialogue

In all of our partner countries, the system of industrial relations and labour law supported and shaped the character of social dialogue. Key elements in the extent of national and local coverage and quality of social dialogue are captured in the following comments and quotations;

Spain: flexibility in collective bargaining system has brought about patchier social dialogue.

Union rep (Public sector, interview): *“Well look, at this moment I think the problem people who have to negotiate have is, firstly, that employers do not have a unanimous position when facing collective bargaining because everyone has his own interests; secondly, I see that workers as a collectivity, given the high instability of the labour market except for governmental officials, do not have either the feeling that they should stand as one at the time of negotiation. Then, and I say it from the point of view of the worker, the negotiation range is very small ... the issues that one can only put on the table have just to do with asking for a minimum wage recovery and certain stability in employment”*

Italy: Our Italian partner commented, “When it comes to unions’ power, company size matters, as the divide between SMEs and big companies affects trade union representativeness and undermines the logic of collective action. Small companies are difficult to unionize and human resource management approaches dominate industrial relations and undermine collectivity. Many trade unions’ rights and prerogatives do not apply in companies with less than 15 employees.”

Poland: Please comment on the system of industrial relations and how far this encourages and shapes social dialogue in Poland

UK:

In the UK most bargaining and collective consultation is between unions and individual employers rather than through employers’ associations and industry level agreements. Since the beginning of the 1980s decade there has been a steady erosion of collective bargaining and union membership. Union collective representation has therefore declined markedly. In large areas of employment there are no union agreements, and while alternative means of collective consultation (e.g. through “staff forums”) may be established, these only offer some of the benefits of a formal social partnership arrangement. Health and safety legislation, in contrast, provides strong support for joint consultation machinery in the form of health and safety committees, so in this area at least, the lack of comprehensive agreements explicitly recognising unions, may not entirely preclude an element of social dialogue. Our employee / trade union oriented workshops were held with union reps who were able to benefit from social dialogue. Social dialogue specifically around the barriers and facilitators to active ageing did not appear to be commonplace but there were exceptions.

4.5.2 Examples of social dialogue

1. Examples across all subject areas

Spain: Discussions are often focussed on productivity issues.

Employer (private sector interview): *"Yes, when they sit down at a negotiating table I think the top theme is productivity which it is differently understood by employers and unions"*.

A union rep complained of the narrow scope for negotiation between employers and unions, indicating that this fact made bargaining around active ageing issues, necessarily problematic, particularly when combined with a lack of inter-firm cohesiveness among employers in sector level bargaining.

Union rep (public sector, interview): *“I think the problem people who have to negotiate have is, firstly, that employers do not have a unanimous position when facing collective bargaining because everyone has his own interests; secondly…workers as a collectivity, given the high instability of the labour market (except for governmental officials) do not have the feeling that they should stand as one at the time of negotiation. Then, and I say it from the point of view of the worker, the negotiation range is very small ... the issues that one can only put on the table have just to do with asking for a minimum wage recovery and certain stability in employment.”*

Italy: Employer’s representative, (Rome Workshop 3): *“Trade unions have a key role in convincing the management and the works councils to apply statutory legislation, collective agreements and bilateral funds in a way that serves to manage ageing problems.”*

Bilateral (jointly controlled) funds seem to offer an important way of spreading and financing good practices in Italy. Sector health bilateral funds are an instrument to protect workers’ buying power and can be extended to provide benefits covering workers’ families. In a similar vein, bilateral bodies in many industries have set up pension funds to complement public pension schemes, as well as training funds. However, as an employers’ representative (Rome Workshop 3) pointed out: *“The sustainability of sector health funds in those sectors where the age average is high could be at risk as there is a high demand for healthcare. Also, welfare measures contained in collective agreements are put at risk by an ageing population.”* So while the mechanism of bilateral funds may be used to spread good practices, it seems plausible that in some circumstances they may act as a break upon employers who may appear “over-zealous” in their pursuit of innovative forms of support for the older worker.

Poland: Can you provide an example of unions and management engaged in social dialogue which demonstrates the typical or most interesting ways in which social dialogue is undertaken in Poland? It may be that you have many examples. We need you to give a flavour of the scope and degree of activity on a day to day basis. How does it work in general?

UK: In all of the trade union workshops, reps were able to comment on a measure of social dialogue taking place. At the very least, union reps supported members in grievances and disciplinary issues and in relation to questions being raised about their job- capability. They also supported members facing changes to their contracts of employment. In some instances, this form of social dialogue (individual representation) can occur despite the lack of a formal collective agreement with the employer.) In the more formalised employer/ employee relationships, social dialogue (consultation and collective bargaining) covers major organisational changes impacting on job security, equalities issues, training and development and a wide range of issues concerning employee welfare and right to equal treatment. In the Building and construction sector, the National Health Service and some parts of the Financial Services sector, there is a high degree of collaboration and social dialogue between employers and unions. This applies particularly in the health and safety field in hazardous industries like construction.

Rep Financial services 1: *“I’ve been a union rep for about two years. Primarily workplace, helping members with their disciplinaries, grievances, basically any issue which a member has that we can assist with. Along with that, [I become involved in] any company decisions with changes of contracts generally across the company.”*

Rep 2: *“I have been a union rep since February this year. Most of my experience has come within capability, mainly. Disciplinaries, flexible working requests, as well as personal experiences over the years.”*

Rep 3: *“I work for XYZ in Stockton…I’ve been a rep probably close to 3 years now, and again I’ve really just dealt with disciplinaries, capability, things like that. Nothing particularly serious.”*

1. Social dialogue specific to active ageing

Through the contributions of interviewees and members of our workshops, we observed examples of social dialogue in action. Whilst it should be said that there was little evidence of social dialogue occurring with an explicit focus on active ageing, as for example in clear and identifiable subject matter in joint meetings, our search embodied a questioning approach to establish whether in less formal ways there was indeed social dialogue occurring that in some way or another might bear upon ageing and *active ageing* issues. The following reports from our country based researchers suggest somewhat different answers to this question, country by country.

Spain: Researcher’s comment: “Extending working life is not on social dialogue’s agenda as per our interviews and workshops. Examples of existing social dialogue specific to active ageing were almost non-existent. The closest that we got was, firstly the announcement of a new negotiation round to be open soon in a public institution in whose framework *ageing* (albeit, not specifically *active ageing*) will be tackled, and secondly, in occasional comments about infrequent social dialogue meetings when attempts to mention ageing issues were made with no further follow-up.”

Italy No examples given

Poland: Can you provide an example of unions and management setting out to tackle an issue *to do with older workers, active ageing or any related subject,* either through formal or informal processes, a collective agreement, joint working or any other example of social dialogue in action? I have looked at page 6 and I don’t find an example there even though there are some interesting quotes – they are not what we are looking for at this point

UK: Interwoven into all of the conversations on individual older workers’ barriers to staying economically active, was the difficulty many had in discussing support from their managers. This included asking for help in making changes to working hours, work stations or job roles. In some cases, older workers were afraid of being at risk of facing a “capabilities related dismissal”. Initiatives on active ageing tended to focus on individuals rather than collective responses.

Dialogue on interventions to support older workers usually occurs directly between employees and their employer, often in an unstructured way. Trade unions frequently facilitate the discussion by representing individuals or groups of workers with concerns about working conditions, advising employers or promoting good practice.

The following are examples of social dialogue initiatives which can be seen to have real significance for an active ageing agenda in the UK.

* *NHS Working Longer Review* In 2013 as a result of Government decisions to amend pension ages, which met with considerable employee/union resistance, the National Health Service embarked on review of working conditions called, “the NHS Working Longer Review.” Most unions with members in the NHS made comprehensive submissions to this review, arguing for specific recognition of the risks faced by their members, and presenting well researched evidence in a series of papers including evidence from membership surveys and other sources. A Working Longer website and various tools and guides were produced and are now available for use by local NHS Trusts and their workers.
* *Construction Health and Safety* In the construction sector, unions play a key role in the regulation of health and safety on large building sites, and while there is rarely a designated focus around extending working life to these discussions, it was evident in our construction workshop that the sustainability of work for workers as they aged and their bodies wore out, was a principal concern. Our reps in the construction sector mentioned that they frequently arranged health and safety training courses for operatives on building sites
* *Problems around ageing and working* Reps commented on the different sorts of problems and issues their members faced around ageing and working. One aspect of this was that older people may want to continue working for broader social, psychological or ethical reasons than might naturally to be imagined as part of the employment relationship. The feeling of having a sense of purpose or being part of a group as they age is part of this. In some cases, issues had been taken up by reps with management.

1. Innovative character and benefits of social dialogue:

In this section we will review examples which illustrate the beneficial or innovative character of social dialogue in the partner countries.

Spain: In Spain small and medium companies (the vast majority in the country) find it difficult to devote resources to the social dialogue processes. The Spanish workshops did not produce examples of innovative approaches

Italy No examples given – however bilateral funds could be included in this section

Poland Examples needed

UK: British unions and the TUC have become increasingly conscious of their social mission to re-establish unionism as a predominant vehicle for social dialogue via workplace representation. Innovations in organising, representation and bargaining for members have been central to this policy. Whilst not directly involved in collective bargaining *per se*, the TUC has played a creative role in campaigning and harnessing the energy of the wider movement, particularly in promoting a form of “New Unionism” to engage with people who have increasingly been unreachable by the unions.

A bargaining agenda has been promoted which embraces equalities, learning, training and development, health and well-being. Significant investments have been made in training a new generation of union organisers. Individual unions have taken these approaches into workplaces. While the New Unionism approach favours a campaigning (even confrontational) style to break down worker apathy, in practice its creative agenda has often sat harmoniously with mature HR management practices. In particular, the unions have sought to demonstrate added value to companies which worked collaboratively with them around this newer agenda, including working in partnership on issues concerning employee learning, health and well-being, equalities issues and more.

Despite all these positive developments, UK unions have not generally driven a consistent narrative around *active ageing*, *extending working life and age management* as such. On the other hand, they have been concerned with issues including maintaining employability (particularly through encouragement of learning) and preserving working capacity (through health and well-being initiatives). All of these issues have featured in union led campaigns as well as in joint partnership working, where a collaborative style has been achieved. However, an explicit link with ageing has not on the whole been recognised in these activities, so it would be fair to describe social dialogue in the UK as generally lacking a strong focus on ageing, though by no means ignoring ageing and its consequences.

While the UK workshops revealed no particular knowledge of the framework agreement, the same workshops showed significant grass roots support for each of the separate elements of active ageing and a readiness to engage in proactive social dialogue upon them. It seems likely that encouragement and “nudge” approaches to support social dialogue around active ageing, would catalyse supportive activities, at least in the sectors covered by our workshops. On the whole therefore, we found a climate in which there is a readiness to engage over active ageing, but in which there is need for more work and education of union and employer representatives in order to carry the social dialogue process forward.

(d) Role of Government in promoting social dialogue

We requested comments of researchers on how far and in what ways Governments in their countries have influenced the development of social dialogue. Responses are shown below:

Spain; Recent history of social partnership in Spain has been one of significant shifts and changes. Involvement of the social partners in industrial policies has traditionally been limited other than with regard to issues such as training and restructuring of industries. In 2011 under the Socialist administration an agreement was reached between the Government and the Social Partners on energy, industrial and innovation policies, aiming for significant impact at the macro level and to promote growth. Since the Popular Party took office in xxx there has been little or no social dialogue on industrial policy. The unions have been strongly critical of the lack of such policies. Industrial Observatories have been established in some sectors. These are tri-partite bodies that look at given sectors from business, labour and technological perspective, analysing strengths and weaknesses and recommending courses of action. At the local level it is common to find the so-called Strategic Plans. Strategic Plans are socio-economic plans characterised by the involvement of the main regional, economic and social partners. They tend to focus on assuring jobs and attracting foreign investment.

Researcher’s comment: *“We have not being able to identify any initiative focused on social dialogue’s promotion.”*

Italy No examples given. We have invited the comments of researchers

Poland: In the last few years, there were contradictory political changes in Poland regarding the retirement age. In 2012 the centrist government raised the retirement age to 67 in line with the prevailing European trend to raise retirement ages in line with increased life expectancy and people remaining healthier. Then in 2017 the ruling (right wing) Law and Justice Party (PiS) reduced the retirement age to 60 for women and 65 for men. (Interestingly, this happened at a time when the society and social dialogue partners had begun to understand the necessity of the unpopular decision to raise the retirement age by the previous government.) In policy terms the decision made little sense as Poland’s 38 million population is among the most rapidly ageing in Europe and unemployment is now at an all-time low since the transition from communism in the early 1990s. Many economists believe that the government has thrown away its most important tool to increase participation in the labour market. Forecasts from Eurostat suggest that even without the lowering of the retirement age, the labour force will shrink by over 4 million (almost 20 per cent) up to 2050.

Public opinion on the changes is contradictory. On one hand 78 per cent of Poles supported the reduction in the age of retirement. (There is little trust in the government and these rapid changes in public policy result in an, ‘as soon as possible’ attitude towards leaving the labor market.) On the other hand, a large proportion of Poles return to the labour market as working or self-employed retirees. (There was an increase of 90,000 in 2017). This arises because Poles, have seized upon the legal loophole allowing them to retire, draw their pension and increase their income, terminate their existing employment contract, officially retire, and recommence employment in the same position. Hence, the employee receives additional income and the employer is able to negotiate a lower wage paid for the same work. Another angle to understand is that whilst many Poles are in principle disinclined to work into their older age and take the opportunity of earlier retirement, pensions are very small and in many cases people miscalculate their financial situation post retirement position and hence return to work to make good the shortfall. It may be remarked that it is somewhat strange that such actions are permitted by law, though more work may be needed to assess in aggregate whether the policy has had a net positive or negative impact on *active ageing*, in its widest sense. Iza – please check whether you agree with all the foregoing, which I put together.

UK: Government has for many years had an important role in shaping industrial relations, including promoting social dialogue and good practice in the UK. British trade unions for many years followed a strategy of voluntarism, whereby the law was as far as possible kept out of industrial relations and the settlement of industrial disputes. In the post WW1 era, local “Whitley Committees” and National Whitely Councils were established, and in key public sector industries they remain the main forums for negotiation of terms and conditions of employment. The right for unions to bargain and be consulted in the public sector therefore rests heavily on past and present Government policies which have accepted the importance of their role.

In the private sector, employee rights to bargain and consult collectively have been established irregularly, industry by industry, often by a combination of industrial conflict (recognition strikes) and sometimes Government influence, (particularly where government contracts might be jeopardised by disputes). Large areas of the private sector however remain non-unionised and unions are not able to engage in any social dialogue.

In companies where unions are recognised, the importance of local workplace representatives has been progressively strengthened in the post WW2 period. Initially, this owed much to the need for a quick, on the spot informal bargaining method, for example over piece work rates. However today, where unions are established, the issues may be quite broad. Nonetheless, in the private sector, union representation is considerably weakened with the result that social dialogue has been in decline.

Government legislation has played an important role in maintaining an element of social dialogue. To mention some examples, the evolution of health and safety legislation was one means through which social dialogue became established, with a right of recognition of Health and Safety Committees and Health and Safety Representatives in union recognised workplaces, under legislation passed in 1974.

Formal consultation rights over collective redundancies were given to employees through recognised unions in 1975. (No such rights existed for non-unionised workers). Thirty years later in compliance with EU legislation, the Government passed the Information and Consultation of Employees (ICE) Regulations providing a means for all employees (unionised or not) to be consulted over big decisions including threats to their security of employment.

The Government agency ACAS supports good practice and encourages employers to consult and provide timely information to employees. By and large, information exchange is treated as a voluntary process and whilst there is a legal procedure for unions to demand the disclosure of information if withheld, it is rarely used in practice.

Hence, in all the foregoing ways, Government has helped unions to engage in social dialogue with their employers, though as explained, the coverage of social dialogue follows a mixed picture with little depth in some sectors and an uneven spread across industries and sectors.

4.5.3 Industrial co-ordination methods in Spain and Italy

*Spain*: In Spain most collective agreements are of a sectorial nature. In 2017, only 265,000 workers depended on agreements signed at corporation/employer level whereas labour conditions of 3.6 million employees were linked to agreements which had been signed at levels above that of their corporations/employers (i.e. at local, regional or national level). Therefore, it is clear that sectorial protocols are the predominant means of regulation compared to those involving local (individual) corporations/employers. (Construction and agriculture are the two sectors with the largest number of collective agreements signed beyond the corporation level.)

In Spain, industrial relations and co-ordination of the labour market is principally conducted through well organised, vertical structures of employer and trade union organisations. Negotiations are highly focused on bargaining through the national institutions both on the trade union and employer side. A recent wage agreement reached at national level in Spain, gives a flavour of the approach adopted. The agreement (a pay agreement) provides general guidelines for negotiators at sectoral and company level. It was signed by the most representative trade union organisations on one side – the Trade Union Confederation of Workers’ Commissions (CCOO) and the General Workers’ Confederation (UGT) – and employer organisations on the other: the Spanish Confederation of Employers’ Organisations (CEOE) and the Spanish Confederation of Small and Medium-Sized Companies (CEPYME). Known as a “Peak Level Inter-Sectoral Agreement,” it will have an important role, providing general guidelines for negotiators at sectoral and company level, covering wages and collective bargaining up to 2020.

Italy: We need a similar description to the above here

4.5.4 Bilateral approaches and bilateral funds in Italy

(To be completed – please insert a short description)

4.5.5 Co-ordination in Poland and the UK

Poland and the UK are characterised by relatively low levels of industrial co-ordination, low unionisation (though concentrated in the UK) and low social dialogue in the strategic decisions concerning industrial development or employee relations at sector level. The two countries are very different in some respects, particularly with regard to the evolution of social dialogue in its different forms. In Poland there is strong support for a system of tri-partite social dialogue but little bilateral social dialogue in the form of collective bargaining. In the UK, a period of thriving tri-partism from the mid-1960s until the early 1990s has now been substantially eroded. Bi-partite social dialogue remains strong, particularly in the public sector. The history and context of these respective developments will be explained below:

1. Poland:

The post-communist era saw the evolution of a national structure of social dialogue in Poland. Whilst this has not always been straight forward and continues to suffer from insufficient representation of employers' organizations, a weakening of the trade unions, and some questionable policies by the government, social dialogue structures are alive and well, especially tri-partite social dialogue (government, employers and the unions).

*Evolution of social dialogue legislation and structure -* Structural changes occurred following a period of dispute in 2013, when the three national trade union representative organisations (the NSZZ ‘Solidarność, the All-Poland Alliance of Trade Unions (OPZZ) and the Trade Unions Forum (FZZ)) – walked out of the Tripartite Commission for Social and Economic Affairs which was at that time the state central social dialogue forum. (This was ostensibly in protest over government revisions of the labour code to make working time more flexible, but came in a context of disillusionment with other government measures, notably affecting retirement and pensions.) A period of agitation and protest culminated in 2015 when all of the parties agreed upon the formation of a new central body, the Social Dialogue Council (RDS) which was then passed into law.

*Present structure of social dialogue -* The RDS is responsible for conducting dialogue ‘aimed at facilitating conditions for socio-economic development, as well as increasing competitiveness and social cohesion’. It aims to achieve ‘participation and social solidarity in the field of employment relations’, in contrast with its precursor’s role of simply ‘maintaining social peace’. The chair of RDS rotates among the three parties yearly. The RDS is granted a separate budget, and has an administrative unit serving its needs. It also has the right to initiate legislation on the issues for which it has responsibility including ‘socio-economic development, the enhancement of national economic competiveness and social cohesion’ and presents an annual account of its activities to the Polish parliament. Below the RDS at national level, the Voivodeship (Provincial) Councils for Social Dialogue operate. In addition, the key industrial sectors all have Sectoral Tripartite Commissions involving the government, trade unions and employers. Hence, there is (in theory at least) ample opportunity to build more effective social dialogue, including around *active ageing*.

*Collective bargaining -* In contrast to this strong tripartite social dialogue structure, bilateral social dialogue is rather weak. Collective agreements exist basically only at the level of large enterprises and in the public sector. Moreover, their number is decreasing. The following quotation suggests that for some employers at least, the institutionalised system of tri-partite social dialogue is an adequate substitute for bilateral social dialogue directly between employers and trade unions at company level.

Employer Representative *“The national and provincial councils of social dialogue are invaluable, they are of a great worth. This value should be expanded downwards. In my view, these social dialogue councils should be based on the key feature of a dialogue and encouraged to develop at the level of counties and municipalities. We should create a certain extensive structure that will facilitate the implementation of specialized solutions. This may even be an incentive since formally in the amended Act on the councils of social dialogue, nothing seems to be forbidden. We will probably lead to this because I have already had one and two meetings with Olsztyn District Office encouraging people to think about creating such a thing.”*

1. UK

In the UK, in organisations or sectors recognising unions, there is in principle considerable scope for social dialogue around active ageing or other matters. The principles of employee consultation and involvement are well understood, even though the expression “social dialogue” is regarded as a European Union term. As explained in section 4.5.2 (d) above, the extent to which employers recognise trade unions in bargaining and representation matters, varies from the private to the public sector. (The public sector tends to be well unionised in contrast to much of the private sector.) Involvement over planning and strategic decision making is however limited. The following paragraphs explain some of the background.

*The ICE Regulations* - Until recently Britain has not had laws obliging employers to establish works councils or enterprise committees. Driven by the 2002 European Directive on consulting and informing employees, the Information and Consultation of Employees Regulations (2004) (the ICE Regulations) established for the first time in the UK, a statutory framework giving employees the right to be informed and consulted by their employers on a range of key business, employment and restructuring issues. The Regulations have had a relatively limited impact on employee consultation, in part because of the high threshold of support which needs to be established for employees to trigger their formal rights and in part because employers have several choices as to the means of sharing information and consulting with employees. Establishing a works council or consultative forum, is one among several approved mechanisms that can be adopted. Voluntary ‘pre-existing agreements’ may pre-empt the use of the regulations’ procedures. The regulations leave wide scope for management inaction or unilateralism, and for unenforceable and weaker forms. Such arrangements can be through one to one and team meetings, company handbooks, newsletters and so on or via employee forums or works councils. The effectiveness of employee forums in non-unionised workplaces has not been reliably measured, although some seem to be more effective than others in the same way as in unionised workplaces. Our interviewees and workshop participants in general believed that social dialogue through trade union representation is most convincing and effective as it is supported by the resources and training unions provide to workplace reps.

*National and sector level regulation/ social dialogue* - Outside of the workplace and the established consultation structures in some industries (see section 4.5.2 (d) above), there are limited opportunities for UK workers to influence broader sectoral development, manpower issues or economic development. This has not always been the case. In 1962 a policy of “tri-partism,” in national and local economic planning, was adopted through a National Economic Development Council (NEDC), serviced by the National Economic Development Office (NEDO). This continued until the disbandment of the system in 1992. The NEDC was a forum for representatives of business, the trade unions and government. Beneath the NEDC (sometimes referred to as “Neddy” were a series of Sector Working Parties (SWPs, or “little Neddies”) which commented in detail on development issues in all of the major sectors. Separately, a system of Industrial Training Boards was estblished, which co-ordinated approaches to training and qualifications in each sector. With employers and trade unions represented on all of these bodies alongside Civil Servants and Government Ministers at the NEDC level, social partnership could be said to be “alive and well” in this epoch.

It might be said therefore that social dialogue has taken several steps backwards in the UK. Today there is very limited opportunity for such dialogue at national, regional or local level. Thirty eight Local Enterprise Partnerships (LEPs) (for England) were established in 2011 comprising representatives of employers and local government, but no places are reserved on these for the trade unions (in contrast to the system in the former Regional Development Agencies (RDAs) which the LEPs have replaced.) The LEPs determine economic priorities and undertake activities to drive forward economic growth or make assessments of skills and manpower needs in their local areas, but generally they offer limited scope for social dialogue. In June 2012 the TUC commented in evidence to the Parliamentary Business, Skills and Innovation Committee that, “…In large part the LEPs have failed to engage trade union and other key social, economic and environmental stakeholders.” (TUC evidence 2012). It remains open however, to the LEPs to recognise the role which unions could play in promoting positive practices and harnessing the energies of employees - *active ageing* being an issue which could well provide such an opportunity.

4.5.6 Extending social dialogue to small businesses.

Researchers were asked for their judgements of the phenomenon whereby small businesses do not seem to engage bilaterally with their workforces. Was this simply a product of the greater proximity of the employer with each individual worker, thus short circuiting the need for any kind of “collective voice” by the workers? Was it more to do with the time costs involved in going through a process of engagement with workers? Or was there some other reason. We did not find overall convincing answers to these questions, though the following researchers’ comments country by country shed a little light on the position of the small business, if only to confirm the foregoing general observation:

Spain: Company-level collective agreements have not boomed… small and medium companies (the vast majority in the country) still find difficult to devote resources to social dialogue processes.

Italy: When it comes to unions’ power, companies’ size matters, as the divide between SMEs and big companies affect trade unions representativeness and logic of collective action. Small companies are difficult to unionize and HRM prevails over industrial relations. Many trade unions rights and prerogatives do not apply in companies with less than 15 employees.

Poland: The specificity of small and medium-sized companies is that there are practically no trade unions there. Research of the STAY project (2017) shows that in most companies of the small and medium-sized enterprises sector there are no trade unions or other forms of employee representation. Only 11% of companies point to the existence in their structures other than trade unions of employee representation forms, and 8% of respondents - the functioning of trade unions.

UK: Social dialogue does not reach small businesses in the UK because these firms tend not to have any recognition agreements with unions. That said, there is often an informality and openness in the relationships between employer and employees in small businesses, which facilitates social dialogue on an individual employee level. The following paragraphs will set out two possible ways in which unions could engage with small businesses in the UK.

Most Small businesses are members of local Chambers of Commerce and Industry which serve every locality and every sector in the UK. The national organisation, British Chambers of Commerce (BCC), links this network together and provides a programme of events and research as well as a mechanism for lobbying Government. While there is rarely any working relationship between local chambers of commerce and local trade union organisations, there are times when they do come together to lobby for shared demands. (A joint TUC and BCC demand to the Government to resolve uncertainty over the legal status of migrants arising from the UK’s Brexit decision, was such an example in December 2017).

Other avenues of local social dialogue could be through the network of *Local Enterprise Partnerships* (which disburse substantial funds for local training funding and economic development). However, the TUC has strongly criticised the LEPs for failing to build collaborative relationships with the trade unions and other social, economic and environmental stakeholders. The potential of the LEPs to reach small businesses in their area, offers an obvious opening for expanding social dialogue, providing there is a willingness to “treat.”

4.5.7 Understanding of pensions issues

Researchers’ were asked for their perceptions of workshop participants’ (management and union reps) understanding of pension issues in their country. This included their assessments of how well the rules around pensions were understood by the social partners. The table below summarises the position

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | High Understanding | Modest Understanding | Little Understanding | No Understanding |
| Italy | X |  |  |  |
| Poland |  |  | X |  |
| Spain |  |  | X |  |
| UK |  | X |  |  |

*Comments and quotations on pensions issues:*

Spain: Our Spanish researcher stressed that the feedback from workshop participants could only shed light on the local position and not levels of awareness nationally.

Union rep, (public sector, workshop): *“Many of the queries that I got as union rep have to do with retirement. For example, they want to know, ‘How much will my pension be?’ ‘Should I stay until 70 because I would like to keep working?’ ‘If I stay, will my pension be reduced to rubbish?’ Or, ‘Is it worthier to step down now?’”*

Human Resources Manager (Private Sector workshop): “*What it is trying the national policy is good. It seems that they want people to understand that what is necessary are private pensions. (…) It is all about a series of interests, I see it that way, and of course there is a lot of misinformation because it also interests”.*

Italy: Trade union representative, (Rome workshop 1) *“The latest reforms in public pensions system, that took place in 2012 with Fornero law, have increased the requirements to obtain a public retirement pension”.*

Poland: No comment provided

UK: Researcher’s comment: Reps’ understanding of pension issues varies from high to modest. Management representatives may have had a somewhat deeper understanding but not significantly so. Most reps admitted that they and members were vague on pension details. The problem most frequently raised by both reps and managers was lack of clarity of the rules and the changing nature of pensions, notably the decline of defined benefits “final salary” schemes.

There was discussion on how far pension schemes facilitated (or inhibited) working longer. For example, we noted reported views among union members to the effect that the income tax system penalised those who drew their pension whilst continuing to earn a salary. The concept of partial retirement was seldom raised in the workshops.

Employers’ Rep (Interview ENEI): *“I suppose there are a lot of areas where there is agreement especially around the need for pension policies which … don’t make it more difficult for people who want to work longer, to do so. For example, being able to draw your pension while staying in work which I know was quite difficult for a while not too long ago.”*

4.5.8 Understanding of policy, rules and legal provisions in relation to other matters relating to ageing workforce

Both policy approaches and understanding of them vary from country to country in relation to skills training. Our concern in the workshops was to establish how far union reps and employers were familiar with the rules and technical regulations surrounding these issues in their own country and how far union reps sought to influence employer’ or public policies.

Researchers commented on levels of understanding of policy, rules and legal provisions in relation to age discrimination, apprenticeships and training and on the policies of their government in relation to the ageing workforce and retirement. The following table summarises assessments, using a four point scale, “High,” “Modest,” “Little” and “No understanding.”

1. Assessed levels of understanding (management participants)

The following are comments on the understanding and views of workshop participants in the four countries on the policy, rules and legal provisions relating to these three issues

|  |  |  |  |
| --- | --- | --- | --- |
|  | Age discrimination | Apprenticeships and training | Government Policies on ageing workforce and retirement |
| Italy | No understanding | High | No comment |
| Poland | Modest | High | Modest |
| Spain | No understanding |  |  |
| UK | Modest | Little | Modest |

*Age discrimination (Management)*

Spain: ”Line manager (Private Sector workshop): “*I believe that in general there is a lack of knowledge of these policies, as it is the case in Spain with all policies emanating from the European Commission. In Spain we do not give importance to the European Commission.”*

Italy: Employer representative (Rome Workshop 3) Speaker believed that, “*a public system of welfare that implements active labour market policies, both regarding outplacement and vocational training, is necessary to guarantee the inclusion of older workers in the labour market….*”

Poland: No comments

UK: Researcher’s observations: There was a fair degree of awareness of the important facts about age discrimination, though the finer technical aspects of the legislation tended not to be fully understood either by employers or union reps. For example, the erroneous idea that “you cannot do anything different for a particular age group because this would be ageist,” seems to be alive and well.

We heard of no organisation presently following policies requiring people to retire at a given age. On this level therefore, age discrimination appears to have been effectively eradicated. However, managers and reps seemed to have only a sketchy understanding of the technical provisions of the law and issues around ageism and age discrimination rarely get aired in discussions between union reps and management.

Apprenticeships and training (Management)

Spain: The Spanish partner described management’s understanding of apprenticeship and training issues as ‘modest.’

Italy: Employer rep (Rome Workshop 3) *“Older workers (from 40 to 60 years old) are even weaker than young people that have to enter the labour market, as for them (young people) there are tax incentives for open-ended employment contracts, apprenticeship, etc.”*

Poland: No comments

UK: Management appeared to understand most of the traditional issues in relation to the need for training employees in skills and the traditional role of apprenticeships. However, new regulations introduced by the Government have caused confusion among many employers, resulting in a fall of one third in the number of apprenticeship places being offered in the past twelve months. The blame for this disastrous fall in the numbers of young people entering workplace based training, is put down to the complexity in the new system of employer levies and grants to ‘support’ apprentice training, which have been described as excessively bureaucratic and complicated and are clearly having a completely counter-productive impact.

Government policies on ageing workforce and retirement (Management)

Spain: Our researcher noted a very low level of understanding of these sorts of policies by managers

Italy No comments

Poland No comments

UK: There was a good understanding that state pension and employer pension ages are rising and that members, particularly younger workers were going to have to work longer. The detailed logic behind the policy was not necessarily fully understood but there was a strong recognition that this would have implications for older workers particularly in arduous jobs.

1. Assessed levels of understanding by Union reps

**Comparing the levels of understanding shown by employers in**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Age discrimination | Apprenticeships and training | Government Policies on ageing workforce and retirement |
| Italy | Good | Good | Modest |
| Poland | Good | Good | Modest |
| Spain | No understanding |  |  |
| UK | Good/ Modest | Good | Modest |

Age discrimination *(Union reps):*

Spain: Researcher’s comment: “No knowledge on age discrimination regulations.”

Italy: Union Rep (Rome Workshop 1): “Equality is not only about active ageing but it is also related with the broad concept of diversity and discrimination, gender differences and reasonable adjustments”

Union Rep (Rome Workshop 3): “It is also necessary to better communicate the existence of active ageing measures as usually workers are not aware about that, but only knows early retirement.”

Poland: No comments

UK: Union reps tended towards a, “well, we have seen all this before,” sort of attitude; deploring the fact that age discrimination continued but lacking either the knowledge of how to use the law or the conviction that it would be beneficial to them or their members, at the end of the day.

Rep (Voluntary, Health and Local Government workshop: “I mean, lip service is paid to equal opportunities. ….people do get looked over when they get older or …their face doesn’t fit because the boss doesn’t like them or whatever. So, it’s often not to do with any qualification or your ability to do the job. Its other factors which are very hard to prove in terms of discrimination. It’s actually very hard to prove discrimination because you’re older. They go against the law but they’re still getting away with it...”

Rep, Financial Services: “To be honest, speaking personally, I never thought of this (age discrimination) as an issue …. I thought, “Oh, it’s illegal to discriminate on the basis of age, problem solved,” and it’s far from the case. So, I don’t know.”

Another rep however, seemed more conscious of a possibility of going beyond direct discrimination to indirect age discrimination. She seemed to understand that use of such a device might be useful in leveraging positive changes in conditions to the advantage of older workers.

Financial services sector union rep: *“I feel like they’re dealing with the direct discrimination, but it’s the indirect (that is making the difference). That’s just there but they’re not doing anything to fix it. So, yes, we need to say you can’t discriminate against age, but that’s the direct part of things. What are they doing to put in place in terms of, say, training and things so that they’re not discriminating?*

*I don’t feel like they’re picking up that element there. So, yes, they’re looking at the direct side of things, but they’re not looking at the indirect in terms of what they can do to stop discrimination and disadvantage from happening.”*

Apprenticeships and training (union reps)

Spain: Our researcher comments: Relay contracts involving training of younger workers are not working to the purpose for which they were formulated. Can you expand on this please?

Italy: No comment

Poland: No comments

UK: Apprenticeship training was a serious concern to reps in the building and construction sector. They were particularly bitter about the “watering down” of skills required in their various trades and felt that fewer operatives were coming to the industry via time honoured four or five year apprenticeships followed by a period of working as a “journeyman” alongside a master craftsman. Highly skilled aspects of jobs were often reserved for a small band of older, higher skilled operatives while the more recently (and lower) trained younger operatives were set to work on less challenging work. Union reps were critical of the “watering down” of skills which they witnessed and saw it as symptomatic of a “cost is all” management culture and a profit motive which was driving decisions. They deplored the short sightedness of management in failing to invest in training new entrants to their industry and described a situation in which the “real skills” of their trade were increasingly only the province of older workers.

Rep: “*In our trade as a bricklayer, what they’re doing now, they get a couple of old bricklayers, old boys, and they’ll be the ones that they will send out to build the corners. They’re the ones that set out the windows. If you get these young guys, all they do is run in the middle. They never learn the skillset, how to build a corner. But we’re going to lose that skill in the end when the older people die.”*

Rep: “*Electricians, you have one or two qualified electricians and the rest of them are just pulling cable and sticking it up. So, we’re watering down the trades, but it’s going to get to a point when the older people are going to retire and there’s no one there to replace them.”*

Rep: “*The other thing is that they’re advertising to train all these young lads as gas fitters, gas testers, gas engineers in six weeks, eight weeks, six-month electrical course. They knock them out in six months now. The colleges are there just earning money out of it, just putting people through. It’s all money making.”*

Reps complained that they were not now being asked to pass on their skills to younger workers in the time honoured way - a damaging trend for which management were clearly blamed, but the reps were also critical of the attitudes of some apprentices:

Rep: “*They’re being sent there because you’ve got the two additional years of schooling that you have to do now. They come to you and say, ‘I’ve been told I’ve got to come here otherwise my mum loses her benefits.’ When I was an apprentice, you had to have high level maths to even get considered for an apprenticeship. Now, they’re coming with nothing at all.”*

So the general picture was one in which the reps deplored the watering down of trades in which they had themselves invested time and energy to learn the necessary skills. One rep had refused to accept what he considered an unacceptable lowering of standards as an apprentice trainer:

Rep (Construction sector): *“One of the reasons I left (the training role) was that 80% had to pass. And I thought, ‘Well, I’m not signing off someone that’s not good enough, because that’s my name.’ And that became a big argument, and I said, ‘I’m not doing it.’ And all they did was get someone else to sign them off.”*

Cost was seen as the limiting factor. Reps were opposed to the Government policy of paying for training only up to an NVQ level 2 instead of the more demanding NV Q level 3. They understood that this directly fed into the skill dilution problems they had identified and felt strongly that older workers should be given a role in mentoring and training apprentices so as to maintain skill levels in their trades.

Rep 1: *“I’m really proud that I’ve got proper indentures but, now, they’re coming away, and it’s just a naff certificate. They get their NVQ level two, it’s three months. Get it signed off, £400. If anyone’s got their level three, that’s what? £3,000? £3,500? If you do the proper level three at college with the whole shebang, it’s about £9,000 in total.”*

Facilitator: *“Do you think that older workers could have a role in terms of mentoring and training the younger ones?”*

Rep 1: *“Yes, definitely. They should do. But not all of them are going to…”*

Rep 2: *“That’s a cost. No one wants to pay for these older people to pass on stuff they learned years ago. When these lads did their apprenticeship, there were probably three bricklayers for each apprentice. They were stuck with those three bricklayers, and those three bricklayers passed their knowledge on. Now employers don’t want those three bricklayers wasting their time talking to some young apprentice. They want those three bricklayers out there laying bricks.”*

Above quotes can be reduced in next version

*Government Policies on ageing and retirement: (Union reps)*

Our researchers have commented on different aspects of their governments’ policies on ageing and retirement. The Spanish research partner highlights the issue of partial retirement arrangements, which have been tried in Spain and not found to be entirely satisfactory. The following quotations elaborate this point.

Spain: Researcher’s comment: “Partial retirement has not fulfilled its original function as a facilitator of knowledge transmission within an active ageing framework nor as promoter of youth workers’ hiring by corporations. This type of retirement has provoked important costs to the pension system and it has been used as a resource for early retirement and rearrangement of the workforce.”[[2]](#footnote-2)

The foregoing observation is echoed by our workshop evidence.

Rep: *“Partial retirements have not worked in our company. I mean, there was an option, a choice that had to be made. The employee had to either work the partial retirement time continuously or, for example, it was done in just two months every year. Those who chose to do it in two months a year, well, neither the work they provided to the company was acceptable nor was it satisfactory for them to have to come back”* (W3, lm) [Spanish thematic report, page 6 CHECK WAS THIS MANAGEMENT OR UNION REP – PLEASE CLARIFY]

Italy: No comments

Poland: No comments

UK: The aim and scope of government policies in response to the ageing of the workforce was explained, but did not form the basis of any deep discussion in the workshops. It appeared that reps accepted the fact that the policy “was as it was”, though the implications in terms of the requirement to work longer particularly for workers in gruelling occupations, were strongly challenged.

* 1. **Barriers and facilitators – Organisational level**

4.6.1 Acceptance of necessity to act:

Members of the research partnership commented on how far employers had, in their estimation, accepted the importance to deal with matters of active ageing at corporate level. The following table summarises comments.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | High acceptance | Modest acceptance | Little acceptance | No acceptance |
| Italy |  |  | X |  |
| Poland |  |  |  |  |
| Spain | X |  |  |  |
| UK |  | X |  |  |

More detailed comments and quotes are shown below:

Spain: Some Spanish employers seemed ready in principle to change, thinking of adaptations that might serve to delay retirement, changing the attitudes and levels of motivation of older workers. The following workshop quotations express this.

Manager (Public Sector workshop): *"... what is clear … I think we were all in agreement on that thing: delaying the retirement age per se is not enough. It is necessary to think about adaptations, ways to adapt to this delay so that this is possible"*

Manager, (Private Sector workshop): *“So far, what we were thinking was, neither the company nor the elderly or the worker wants to be here after a given age. We both [managers and workers] have to change our mindset. It is not only that we must motivate workers so that at 63 years of age they feel ready to keep going, but the company also has to accept that it will have workers 63 and more years old.”*

Italy: Employer Representative (Rome Workshop 1) “*Active ageing is not a priority for the employer association he represents”*

Poland: Awareness of the case for active ageing was reflected in contributions made by participants in the Polish workshops. From the employers’ point of view the case was embraced in recognition of the “challenges” to be overcome in order to achieve active ageing. These took the form of changes in the labour market in labor market:

Employer rep (PL\_WSP\_2): *“…in addition, changes in the labor market pose a huge challenge we are struggling with.”*

Employer (PL\_WSP\_4): “*Currently, though the labor market is changing, a good professional, whether older or younger, is employed.”*

Employer (PL\_WSP\_2): “*… we are doing our best trying to encourage these employees in all possible ways. The pension plan was also supposed to be one of the goals. It is also meant to encourage new employees.”*

Participants spoke of generational awareness and cultures. One employer representative commented on the challenges when the workforce became increasingly age diverse with three or more generations working in the same workplace. Another hinted at a problem of stereotypes of older people obscuring a real understanding by managers of their potential to contribute to the organisation.

Employer rep (PL\_WSP\_3): “*The main barrier is the lack of a generational awareness – the understanding that older workers can bring much to the organisation including a lot of added value. They may have the idea that when one approaches retirement age, he should just wear slippers and sit on a rocking chair with a pipe. I think that in many places, such ideas dominate. There is a stereotypical idea that an older generation employee is not able to learn, does not want to learn, does not adapt and is not flexible.”*

Another employer commented on the fact that the older generation is:

Employer rep (PL\_WSP\_3) *“…a very valuable generation. They tie up with the employer and are emotionally loyal. They respect their work, may be very attached to it, and despite the fact that in our environment, an elder is often perceived quite stereotypically, they really put a lot of effort into their work.”*

Employers emphasized not only the necessity of an active aging presence in the organisation or broadening the employees’ awareness, but also the need to set good examples (“…the example comes down from above,” as one employer commented).

An employer spoke strongly in favour of setting good examples.

*Employer rep* (PL\_WSP\_3)*: “I believe in* ***doing*** *instead of speaking. I think that the nicest and the most beautifully told words of ‘how something is going to look’, can change nothing until at least small steps are implemented.”*

Another recognised the importance of winning support from the Board to make changes.

Employer Rep (PL\_WSP\_3): “*The best practices that you can come up with are worth nothing unless there is some understanding, for example in the management board.”*

UK: The evidence of our workshops was mixed. On the whole there was a positive interest and commitment from employers to deal with ageing workforce issues at company level by the adoption of suitable policies. However, this interest covered a wide range and there was no single position that could be said to characterise all employers. Some employers, for example in the financial services sector, have recognised that there is a “business case” for supporting older workers and have adopted measures emphasising recruitment or retention of older workers, thereby allowing the company to present a broader range of ages in their public facing functions.

More broadly, the employers’ network, *Business in the Community,* which supports various corporate social responsibility campaigns among employers, has been working closely with the Government Department for Work and Pensions to support its *Fuller Working Lives* campaign, targeting employers and encouraging them to “recruit, retain, retrain” older workers. (The *Fuller Working Lives* programme is part of a broader, long term programme by the Government, which has been reaching out to employers and voluntary groups to encourage them to *extend working lives.* The policy in turn has beendriven by the growing population of “older old” people and the desirability of maximising the economic potential of the country’s ageing workforce.)

The employers at our workshops came from a range of disciplines, but in the main were HR specialists of some kind. Participants in our Humber LEP workshop had a particular interest in workforce recruitment. With this in mind, one company had explored policies to encourage a broader range of individual applicants for jobs, including older people. The example of Barclays Bank was a case in point. Here, a wide range of policies supportive of the older worker have been adopted, including a well-publicised pilot scheme for older apprentices.

Generally, our employers were sensitive to their legal duties to avoid age discrimination. Despite this, an employer representative conceded that formal policies of companies may not necessarily be reflected at all levels in organisations and that the formal adoption of good corporate level policies to deal with ageing workforce issues could still leave scope for negative practices at lower levels in the organisation.

Employer (ENEI): “*Although I think that many—certainly, larger organisations have now got pretty age-proof policies in place, it’s still difficult for them, and they have made a lot of effort to train their recruitment teams, for example to avoid age bias. They will only use reputable employment agencies or recruiters. It’s still difficult to unravel the sort of stereotyping that’s going on… I think there are a lot of employers who are age neutral. I don’t know of any organisations who have gone to the point where they will say we’re actually going to take what’s called in the UK,* ***positive action*** *in terms of providing or improving accessibility for older workers to employment prospects.*”

However, some employers *were* adopting policies to support *existing* older workers, though few had been planned strategically to address workforce ageing. Few if any had extrapolated their age positive policies to embrace a potential future, older workforce. (None had formulated a fully blown “age management” action plan.) That said, a few individual HR managers, were seeking to understand the “business case” and come up with ideas.

HR Manager (Medium sized not for profit organisation) London Webinar: *“I am interested in the whole workplace well-being narrative. The way things are going we are all going to have to work a lot longer. Seeing as we spend so much time at work, it is becoming imperative that this kind of social dialogue to happen. However, I am not sure that my organisation is fully on board with* *this. Maybe the topic has to be raised for senior management to become more aware of it.”*

4.6.2 Line managers’ acceptance of business case for active ageing

Researchers gave their assessments of the degree to which line managers in their interviews and workshops recognised the ‘business case’ for active ageing. The following table summarises these assessments.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | High acceptance | Modest acceptance | Little acceptance | No acceptance |
| Italy | X |  |  |  |
| Poland |  |  |  |  |
| Spain |  | X |  |  |
| UK |  | X |  |  |

*Quotes and evidence on business case:*

Spain: Manager (public Sector workshop): *"... what is clear is what we have said, I think we were all in agreement on that thing: delaying the retirement age per se is not enough. It is necessary to think about adaptations, ways to adapt to this delay so that this is possible"*

Manager (Private Sector workshop): “*So far, what we were thinking was, neither the company nor the elderly or the worker wants to be here after a given age. We both [managers and workers] have to change our mindset. It is not only that we must motivate workers so that at 63 years of age they feel ready to keep going, but the company also has to accept that it will have workers 63 and more years old"*

Italy: HR Manager (Rome workshop 2) *“Active ageing is an issue because the working population is aging rapidly, particularly, in the most important parts of the production cycle”*

Poland: Employers emphasized not only the necessity of active aging presence in the organisation or broadening the employees’ awareness, but also the need to set good examples (“The example comes down from above”, as one manager put it.)

Employer rep: *“From the organization's point of view, I think that a comprehensive perception of employees is important. I believe in doing instead of just talking. I think that the nicest and the most beautifully told words of how something is going to look like, can change nothing until at least small steps are taken.”*

Employer rep: *“The best practices that you can come up with are worth nothing unless there is some understanding for example in the management board. I think that this is important but I also see that for example small employers in one-man businesses where the boss owns the company with, let’s say, only a few or up to twelve people, in these organisations such employee centred activities are completely omitted, or there is even no such thinking.”*

UK: While UK employers are in general not thinking holistically or strategically around older workforce issues, *some* HR leaders are keen to pioneer new approaches. In specific organisations, a “business case” argument is being developed, which in turn may gain “buy in” to ageing workforce strategies at a senior level. In our employers’ webinar an HR professional (who had been acting as a freelance consultant to other employers) commented:

Employer, London Webinar: *“I am looking for information and an evidence base in order to sell the concept to senior leaders in their organisations. Until people really start to feel the pain and see how demographic changes are going to impact on their ability to have the kind of organisation they need, there won’t be changes. Senior management need to understand the impact of demographic change on their position in the market place otherwise we are not going to see changes. And I would like to try to land some that with people who are in charge of well-being and diversity because even in organisations that are quite good on diversity, they are not generally so good with older workers.”*

An individual representing a small new start-up company in the IT sector, had adopted a deliberate strategy of *seeking out* older workers to recruit as a way of getting high value technical know-how into the organisation more cheaply than could otherwise be imagined.

Business Manager (IT start-up – London): *“We are mainly hiring really young graduates coming out of University, which is really what we can afford. These older guys are providing an amazing ability to upskill and develop these graduates without us needing to set up training courses, because we have got that kind of experience in house through them. So this has just come through hiring a different type of person really. They were hired mainly because of the experience they can bring to the technology team but we have hired them on a very flexible basis. They can work from wherever they want to work and for the days and hours they want to work. This arrangement has been what has attracted them to join us rather than continuing to work for big corporates.”*

Employer (Webinar): *“I think a lot of organisations are beginning to realise that there is a lot to be done. A lot of this is under the umbrella of “workplace well-being” and this is leading on to all these different branches of this subject and definitely the ageing workforce and active ageing is quite crucial.”*

* + 1. Concerns over productivity issues with older workers:

Our researchers were invited to comment on how far they discerned that any failure by managers in their workshops to respond to the needs of older workers, was attributable to short term pressures on organisations to maintain productivity. The following table summarises the extent to which productivity issues were seen as the main reason for inaction.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Strong cause | Modest cause | Small cause | No cause |
| Italy | X |  |  |  |
| Poland |  | X |  |  |
| Spain | X |  |  |  |
| UK | X |  |  |  |

Quotes and evidence on the productivity issue as a cause of employer inaction to support older workers, are given below:

Spain: Human resources manager (Public Sector workshop). *“Many of those agreements, on conciliation, adaptation, are actually… incompatible, you might say, that is, if the measures are not applied very carefully, they are incompatible with the provision of a service with a certain degree of normality”.*

Italy: HR Manager (Rome workshop 2): *“The topic of active ageing is related to labour productivity: the more workers get older, the more their performance reduces. From an HR management perspective, active ageing should primarily consist in ensuring that the aging of working population does not lead to a decrease in productivity or to an increase in labour costs related to absenteeism due to health problems, replacement costs and so forth that is not compensated by productivity growth”*

Poland: Researcher’s comment: This is especially true in SMEs.

UK: The productivity issue would seem to be a major factor conditioning employer attitudes to older workers. In the building sector, workers and employers alike were conscious of the fact that the *pace* of work was important. Being able to maintain the pace of work required to make the job cost-effective, was a fundamental priority.

An experienced Occupational Health Physician: *“The thing that strikes me, having worked in the not too distant past for such organisations as Network Rail and Royal Mail, is that one of the big issues is … performance management. Older people may not be able to function as rapidly as someone who is forty years their junior, either mentally or physically. I don’t see an awful lot of recognition of that fact in the way employers deal with people in their 50s or 60s. The expectation is that they must perform the same as everybody else. That’s fine but in a physical role you may struggle and end up in a capability dismissal because they can’t keep up. They could probably function at 75% or 80% but their employer can’t or won’t tolerate that and I think that’s because they don’t want to be seen to differentiate in terms of what people do. It is easier for them to apply a blanket rule and say, “If you can’t make the cut and knock out a thousand widgets a moment, we can’t use you.” And that’s easier than justifying differences. Or it’s just because they have got plenty of people who want the job and frankly it doesn’t matter.”*

*“… in organisations like Royal Mail, where the Postmen and women nowadays are encouraged to rush around more rapidly than they might have done ten or fifteen years ago anyway…and they sometimes don’t last long because we push them fairly hard. And I say to the organisation, “Can’t we just go a little bit more gently with these guys? They are good guys but expecting them to batter through a thousand cases a day is hard work. You know we could still use them usefully and make whatever financial rearrangements are there to be made but they should be allowed to go a little more slowly than their otherwise peers.”*

While business and commercial constraints may leave little scope for a general slackening off of pressure to achieve output targets, the commentator in this case is arguing for social dialogue to re-set production norms for older workers and to find some way of making this commercially acceptable to the employer via a reduction in wage costs in some form.

* + 1. Fear or reluctance by managers to hold conversations with employees about age:

The research team considered how far managers, in their respective workshops, provided evidence of “holding back” on having serious conversations with individual employees about their future work or retirement intentions, through inhibitions, or fears of an adverse reaction. The table summarises responses:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Strong cause | Modest cause | Small cause | No cause |
| Italy |  |  |  | X |
| Poland |  |  |  |  |
| Spain |  |  |  |  |
| UK |  | X |  |  |

Quotes and evidence on the issue of employer reluctance to discuss age and future work intentions:

Spain: This issue was not covered in the Spanish workshops or interviews

Italy: No comments

Poland: Mature employees’ choices are to a certain extent determined by the situation prevailing at the place of employment. The employer, through the organizational culture, methods of communication, treatment of subordinates and motivation may encourage longer activity or just the opposite.

Employer rep (PL\_WSP\_2):“It depends on the atmosphere in the workplace and what the employer's opinion. Most people, for various financial reasons, want to stay – now the question is whether or not it is possible.”

Employer rep (PL\_WSP\_2): “Most often, supervisors give tasks and these tasks have to be fulfilled. There is no reflection on whether the brigade is older or younger. The supervisor will say, ‘Get it done among yourselves. This is a matter of getting along.’ This approach is a barrier to the involvement of older workers however.”

Employer (or employee) rep?? (PL\_WSP\_4). “*The greatest expectations are if those employees who have already lost their health say, ‘we want to leave.’ When they work under stress, poor working conditions, or carry heavy loads, then all these factors disqualify them and the employer says, ‘I need a strong, fit human with a healthy spine.’ So it is difficult. On the one hand, we understand the employer, but on the other hand, these people lost their health because of 40 years of work.”*

UK: There is evidence that some employers are reluctant to have conversations with older employees about work intentions. The following discussion reveals a level of sensitivity about holding conversations or even asking simple questions of employees about their age:

Humber LEP Employers’ Workshop, Employer 1: *“I think that's potentially a barrier because in some cases, you may want to start some kind of dialogue because you see somebody starting to struggle. Well then there's a barrier (about the fear of) discriminating ... So actually, more often than not, the only way for that person (to get help is for them) to come to you to actually say ‘I’m starting to struggle’ (so that means it is down to the employee to start the dialogue). So actually in some cases that could be about conversations that might be more helpful, and could have resulted in changes being made.”*

Employer 2: “*In our conversation somebody mentioned to me … the question of retirement and I said, to the guy, ‘At what time, or at what point are you thinking of retiring?’ And he said, ‘You can't ask me about that!’ I was only being friendly.”* (Laughter)…..*I mean I was just being friendly. I hadn’t even considered that I could not speak to someone. It wasn’t an official conversation of any kind. It was a passing comment, but how bizarre is that?”*

Facilitator: *“How do you think…?”*

Employer 2: *“Obviously not that long ago, you could forcibly retire someone at what, 65? I think that everything’s been changed that much and the people aren’t comfortable, with questions about what they can and can’t do around their age.”*

In contrast, a few companies were adopting new approaches to establish the preferences and plans of employees around the age of 50.

HR Manager (AVIVA insurance company): *“Our company has introduced a pilot mid-life career MOTs for people once they have reached the age of 50, which are designed to discuss the subject of retirement. … It is intended to send a signal to our people that 50 is not the age of winding down, but is mid-career – you have got another 15 years of good life to live. … it was driven by a business need. We were conscious of a skilled set of workers that we were fearing we might lose. So we responded by saying, ‘We need to retain these people.’ … We are working with the local people on it to get their views.”*

HR Manager: *“As well as the mid-life career MOT, we have processes in place so that any job that is advertised in the company is potentially available for flexible working, so this makes it possible for workers of any age who have either a health condition, a disability or a caring role to achieve a working week that can more easily allow them to continue working, notwithstanding these personal circumstances that might sometimes preclude them from doing so.”*

4.6.5 How far did researchers see evidence of employers continuing to use early retirement to manage their manpower requirements?

The table below summarises responses:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Using it a lot | Making some use | Very infrequent use | Not making use |
| Italy | X |  |  |  |
| Poland |  |  |  |  |
| Spain |  | X |  |  |
| UK |  |  | X |  |

Quotes and evidence on the issue of employer use of early retirement to manage their manpower requirements are shown below under the different countries:

Spain: Union rep (Public sector, interview): *“The only solution that the company where I work can make available to the worker is early retirement ..., dismissal, say, mutually agreed so to speak. (…) I've been in this firm for 25 and the truth is that in our company the only way we have faced the aging work has been through tools for workers to reach retirement age earlier ...”*

Italy: Trade union representative (Rome workshop 3). *“Companies are more interested in hiring young workers as it is more convenient from an economic point of view and also because those workers are more flexible at a physical and mental level. For that reasons, companies are more interested in promoting the access to early retirement than measures to keep older workers active at work”*

Poland: No comments

UK: Early retirement continues to be available (usually as a voluntary option) to some employees in the UK in downsizing or redundancy situations. If given in a redundancy situation, the employee may receive a severance (or redundancy) package as well as an early pension, making it an attractive deal (particularly if they were likely to retire a few years later anyway). The details of the “package” offered would depend on the employer, and are often covered by a collective agreement if the company is unionised.

Early retirement may be offered to employees who wish to retire early on grounds of ill health. In such a case, retirement may be described as “voluntary,” though in practice, the employee may have little option, particularly if the employee is unable to do his or her job because of health issues.

Other than in a redundancy situation, enforced early retirement would probably be unlawful unless there is an employer justified retirement age (EJRA). (EJRAs are rarely used outside the emergency services, but in principle they are open for the employer to adopt.)

That said, the risk of being *made* to retire or being made redundant from the job, is still a concern for many employees in times of uncertainty when unemployment and job loss can be hugely damaging. The other side to the coin is that reps were aware that many of their members would not wish or be able to remain in the same job until normal retirement age at 67 or later and might welcome the chance to take an early retirement offer. Early exits were once very common but many more employees would today regard them as double edged swords. Early retirement might offer the chance to transfer into a more sustainable job whilst being able to draw one’s pension. On the other hand, unless one is lucky with a generous pension, one may end up needing to get a job of some kind, perhaps on shorter hours and lower pay. Failure in the job market at this age might lead to permanent exit and personal hardship.

The following exchange emerged from a discussion on mid-life reviews:

Facilitator: *“How do you think your members would respond to the idea of a mid-life review at say the age of 50? Would they welcome this?”*

Union rep: *“I think they would be interested. For example, you would know what age you were going to retire at if you had one. I’d know what was going to happen in ten years’ time; am I going to be able to stay at X or will they try to push me out? Will there be different jobs you can do?”*

4.6.6 Technological change and support for older workers:

How far have technological changes have dominated employers’ abilities to make changes to support their older workers? The views of our researchers are summarised in the table:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Big impact | Some impact | Very little impact | No impact |
| Italy | X |  |  |  |
| Poland |  |  |  |  |
| Spain |  | X |  |  |
| UK |  | X |  |  |

Spain: Human Resources Manager (Private Sector workshop). *“This year there have been people who have left, highly skilled team leaders with an expert leadership until now in welding (that it is very important here). However, things have changed. Now there are robots, welding robots and some workers did not want to learn welding. … If you are not motivated to learn, many other positions start to be less interesting for you. You become aware of being clumsy and you even boast about it. And you start thinking, ‘ well, at my age it makes less sense to be retrained on new technologies’”.*

Italy: “In capital intensive sectors technological change necessitates continuous skills update. Labour intensive activities are generally associated with lower skills and therefore workers are more substitutable. This impacts on older workers “obsolescence”. (Researcher’s comment)

Poland: Employer or employee???: “*There is noticeable technological progress, which means that in 20-30 years, quite a lot of professions will disappear.”* (PL\_WSP\_5)

UK: Union reps were aware of some of the possibilities and dangers which technology could bring its implications for the ability of workers to extend their working lives. However, there was scepticism that it would be used in worker-friendly ways. In a discussion about the employment of more female workers in the construction sector, one rep commented on the greater gender diversity which could lead employers to use modern, lighter materials in wall building. This could have a beneficial impact on workers of both genders and reps welcomed this opportunity arising from technological change. On the other hand, a discussion about the use of robots and other fourth generation technology makes clear that some union reps have concerns about the implications of technological change. Nonetheless, there was interest in the potential of technology to support active ageing, including in the final quotation below, the suggestion that older workers might have future roles, teaching robots skills in bricklaying and other trades.

Rep 1 (construction workshop):

*“Some technology seems to be more about displacing workers rather than supporting them...[On the other hand] I think there’s some technology that could actually take away some of the stresses and strains on the body that would be coming in the future. In Germany, you were talking about the automation workshop, where they’ve got a scaffolding thing that comes in and the scaffolders are not doing all that physicality. It just puts itself up, like, by a pulley system. I mean, that’s going to help, but then it’s going to drive people out of work. It’s never going to balance itself out.”*

Facilitator: *“What about robots?”*

Rep: *“With drones now… we train them to lay bricks but they just can’t go round corners at the moment. But with drones, they can fly over a site and measure it just by using the three points. Three points over a spoil heap, it tells you exactly how much material you need, how many boys you need to do the whole job. It’s not just us, it is the managers in the construction industry who will be needed less. It’s going to hit the whole industry, not just the manual workers.* *The way that will work well is if, when robots come in and help out with the industry, the retirement age comes down.”*

Rep 2: “*It is never going to happen*.”

Rep 1: “*No, exactly, but if you finish work, because obviously the robots are helping out and you don’t need to work so long …, you’re still going to have to wait until you’re 67 and you’re going to have to fight and try and stay in there, … struggling every day with body pains and stuff.”*

Rep 3: *“To retire early, you need money. Robots don’t earn any money. They don’t pay any tax, they don’t cost anything…”*

Rep 1: *“It would be a great idea if, as you got to a certain age, you were put first in the line in operating these machines. So, you come off the physicality and you learnt to operate them… Because you still need to have people pass on skills, and that’s not happening as much now.”*

4.7 Barriers and facilitators – Individual Level

4.7.1 Reluctance by workers to talk about their own retirement plans:

Our partner researchers commented on whether or not specific characteristics of individual workers might be standing in the way of an active ageing approach. The characteristics offered will be dealt with in the following tables and commentaries.

Do specific characteristics of older workers stand in the way of an active ageing approach?

|  |  |  |
| --- | --- | --- |
|  | Yes | No |
| Italy |  | X |
| Poland |  |  |
| Spain |  | X |
| UK |  | X |

Spain: No available evidence or comment

Italy No available evidence or comment

Poland No available evidence or comment

UK: There was some suggestion that workers may be unwilling to engage in discussions about their retirement plans owing to fears that being too open could convey the impression that they were anxious to retire. Some of the union reps referred to members having a fear of retirement as they did not feel they could *afford* to retire, even though troubled by increasing demands of the job and progressively deteriorating health conditions limiting their capacity to work. A representative in our construction workshop expressed the problem in this way:

Union Rep, Construction Workshop: *“I think the three biggest issues, that have been mentioned, are the physical demands of the job, …the precariousness of work and retirement and being able to afford to retire and, in some cases, being forced to work longer in a more precarious situation where you’re not really sure if you’ve got a job from day-to-day. Thirdly, there is the issue of technology which seems to be more about displacing workers rather than supporting them.”*

4.7.2 Lack of planning to support later life career development or job change:

How far do employers engage in planning and reshaping jobs so that they are more sustainable both throughout the life course and for older workers in particular? The following table records our researchers’ impressions of the extent to which the lack of planning to support later life career development or job change was standing in the way of an active ageing approach.

|  |  |  |
| --- | --- | --- |
|  | Yes | No |
| Italy | x |  |
| Poland |  |  |
| Spain | No evidence |  |
| UK | x |  |

Spain No available evidence or comment

Italy No available evidence or comment

Poland No available evidence or comment

UK:

There was enthusiasm for the idea that jobs could be changed to support older workers remaining in the workforce. This was particularly evident where workers were complaining of being “worn out” by the job, in such occupations as ambulance paramedics and building and construction workers. Reps in the construction sector saw opportunities for older workers to be used as an elite skilled segment of a workforce, needed as a result of inadequate craft apprenticeships/ training. They commented that in some instances, the more demanding aspects of jobs were now reserved for a small band of higher skilled, often older operatives. While this did not necessarily meet with their approval, it seemed to provide openings for some workers in the twilight of their careers.

Rep (construction workshop): *“Electricians, you have one or two qualified electricians and the rest of them are just pulling cable and sticking it up. So, we’re watering down the trades, but it’s going to get to a point where the older people are going to retire and there’s no one there to replace them.”*

Rep (NHS Ambulance Service): *“I think if there were alternatives available, if there was some sort of process that would protect your pay and do something about all the physical lifting, shifting, and the shift work, then maybe staff would be staying on at work longer. You know, what are the paramedics going to do? They retire early don’t they? A lot of them go early - before 60 sometimes. And that’s a hit on your pension to take, you know, but that’s what we have to do.”*

Rep (NHS Ambulance Service): *“There are other jobs within the service which we could do. We have people that get the ambulances ready. (We have a 24-hour, 365 days in a year service.) We have to be able to come in and pick up the keys, get in that ambulance and go, from the minute we log on to the last second that we finish on a 9-5 job. And if we go to particularly nasty jobs, sometimes filthy jobs, a lot of equipment used, body fluids, blood, sick, whatever, we have to be able to go back and just say “There’s the keys,” and there’ll be another ambulance ready for us to get in and go. Our role doesn’t exist if they don’t make the ambulance ready. But if you’ve got people with that knowledge and who know the inside of an ambulance better than anyone, why not use them? If someone gets to the point where they say, ‘I can’t do the lifting and the shifting and the chest compressions and the going out and the kneeling down and lifting people,’ this would be an ideal ‘step down’ job for them. But these jobs are contracted out to another organisation, so unfortunately this option is not available.”*

*4.7.3 Other systems of segmentation of workforce*

Researchers shared views on whether segmentation of the workforce was a barrier to the continued employment of older people. (Dimensions of segmentation offered included, gender, skills/qualifications, agency/contingent workers.) The table below summarises responses to the question of whether such forms of segmentation are indeed such a barrier:

|  |  |  |
| --- | --- | --- |
|  | Yes | No |
| Italy |  | X |
| Poland |  |  |
| Spain | X |  |
| UK | X |  |

Spain: (Human resources manager (public sector workshop): *“We have identified a concern among contingent workers who may be employed in seasonal working of some kind. Their hiring periods in the company are at best four to six months – they are hired only for the duration of the season. A large part of this group do not get engaged in complementary employment outside the season because they have a certain irrational fear of losing their seasonal job. Then we understand that part of the reluctance of these workers to apply for secondary jobs is that they will have to pass a medical examination and they fear that if they fail it, they may also find their seasonal jobs are jeopardised. They are, in the main, people of a certain age and in jobs that require a high physical performance. If they were to fail their medical examination, one could argue it would be better to adapt the jobs or the physical conditions so that they would be able to work.”*

Italy: No comments

Poland: No comments

UK: Segmentation of the workforce was not strongly commented upon as an issue obstructing discussion of an active ageing agenda, though it might be presumed to be an influential factor affecting the life chances of many workers’ ability to work longer. Ambulance paramedics were particularly concerned that newer entrants to their occupation tended to be university educated and had access to career pathways which led them out of the physical, high stress work of the mains-stream ambulance paramedics, whereas the older, less well qualified paramedics were denied these opportunities. They saw this disparity as unfair and unsustainable and were critical of management for failing to provide an equality of opportunities.

Rep (Ambulance Service): *“They are…you know, the kids that are 20 years old will not be there in 10 years’ time. You’ll be lucky if they’re there in five years’ time because they are not seeing it as a career. The likes of us, the 40 plus, you’re not looking to go anywhere else, but you know that your body can only take so much. These kids that are 20 … they become paramedics and they’re already thinking of the future. They’re already thinking that they can go and work in the minor injuries unit on Monday to Friday. They don’t work nights. And the pay, again, because minor injuries units are run by private companies, it’s not an NHS company. It’s very much geared towards the money side of it. So, the turnover of staff… you haven’t go the longevity anymore.”*

**5. Perceptions of active ageing (including ageing and working)**

In this section we will try to compare the attitudes and values of participants in our workshops in the four countries, on the issue of active ageing. Comparing attitudes and behaviours of participants in different countries with different frameworks of employment law, different traditions and cultural values and different systems of industrial relations may well prove challenging. However a fine grain comparison is not our objective, but rather broad generalisations that can illuminate the main areas of research in our project, explained earlier our introductory section.

5.1 How social partners saw active ageing

Members of our researcher partnership reported on what they took to be the perceptions or vision of social partners in relation to active ageing. Responses are given under headings selected from an offered list. Multiple choices are possible under each heading. Additional qualifying comments have been made in some instances.

Vision of active ageing

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Spain | Italy | Poland | UK |
| Opposition to the basic ideas |  |  |  |  |
| Indifferent to the ideas | X |  |  |  |
| Not familiar / showed no interest |  |  |  |  |
| Indifferent but showed interest once basic facts had been explained | X | X |  |  |
| Somewhat knowledgeable already and interested to hear more | X |  |  | X |
| Strongly knowledgeable |  |  |  |  |
| Keen to be proactive | X |  |  | X |

*Quotes and comments in relation to social partners’ vision of active ageing:*

The following quotations reflect examples of the above views of active ageing.

Spain: An active ageing culture does not seem to exist in Spain at the present time. Whilst the following comments from employers show a degree of ambivalence and occasionally scepticism towards the idea of active ageing, invariably this is mixed with recognition of the need for active ageing policies and an interest in pursuing the issues.

Employer (private sector, interview): *“In the different companies I do not know if active ageing is being implemented or not, or how they do it, or if they do it in a natural way, as I understand that things have to be done ... but if you ask me and I have to be realistic, I think right now, the unions don’t have active ageing in their roadmap. Why? Because there are other things that have a higher priority for them than active aging. That is what I understand. It is true that there are unions that begin to introduce active ageing in their language. This is also true. But I think we all have to believe in active ageing, because if we do not believe it ... everything is fantastic on paper, paper supports everything, but that has to be translated into real policies.”*

Human resources manager (public sector workshop): *“There are companies where there has been and I have seen, I insist, where there has been a culture [around the ageing of the workforce], which also requires a very high consensus, to make pathways and itineraries for those workers who are in the final stages of their careers.”*

Human resources manager (public sector workshop): *“This [active ageing] is a question that is emerging at this time and therefore if there are countries out there that have a long tradition in this matter, because they are more consolidated, we could use their tradition very well.”*

Human resources manager (Public Sector workshop). *“The lack of culture. It is now that we are considering the ageing of the workforce. Because until now it has not been an element that was on top of the table. This element appears precisely now that we have this older workforce. [What we must do] It is to create that culture, that people have the culture of active aging and put this culture at the centre of our claims. Both, unions and employers have to take this seriously.”*

Not unlike the employer representatives, the Spanish trade union representatives showed openness to the ideas of active ageing, though they admitted they had started from a low base of awareness.

Union rep (Private Sector workshop): *“When you are involved in the workshop you see the perspective, you see the reality that it is coming. Yes, it is true, the workshop makes you think that it is going to happen [the ageing of the workforce], and that we have to analyse and think how we can tackle it …It has made me think, I have to have better conditions. I have to have a motivation that it is almost always economic, but I have another motivation, which is that they recognize my work in this company and therefore I may continue to teach those younger workers. If we pay attention [to active ageing] surely there are enough reasons to think about it. However, it's true, we're not educated yet [around active ageing], and that is the first problem with this issue.”*

Union rep (public sector, interview): *“Active ageing is a topic that we are starting to talk about but not at the convention table, but as something like ... in the corridors, you know what I'm saying? Some people say ‘Active ageing is something that we would have to see how to do it, how we do it ...’. Of course, companies face the problem: what do we do with this older worker?”*

Union rep (Private sector workshop): *"I think that the good practice [on active ageing] has already started. We have started to analyse us [in terms of what we are doing with regard to active ageing]. I think the best practice is to understand at least the ASPIRE project"*

Italy: Trade union representative (Modena workshop) *“Responding to the needs of this segment (older workers) of the population represents an additional problem but at the same time it can also be an opportunity to include new provisions in collective agreements, for example, work-life balance, smart working and different modalities of flexible working”.*

Poland: No comments

UK: Some of the social partners seemed to pragmatically accept the idea of active ageing as a necessary corollary of Government policies to raise state pension age. Ideas included changing conditions in which people worked so that work and ageing were more sustainable. On the other hand, while building and construction sector reps commented favourably on a decline in numbers of accidents in their industry they were very aware of continuing unhealthy practices which were likely to impact on the long term health of those working in the industry. Their attitude was not one of opposition to the idea of active ageing *per se*, but embodied a strong element of scepticism as to whether active ageing was possible given the health effects of their work.

The attitudes and views of reps varied somewhat by sector. Overwhelmingly, they were keen to hear more about the kinds of remedies, adaptations and interventions that would be possible. In construction, examples were given of health and safety interventions which reps would like to see and the impact of technological change and greater gender diversity in their industry. In the finance sector, reps were concerned about rapid changes in the industry – processes and procedures changing at a rapid pace – and the problems of older workers adapting to these, while employers seemed to make little allowance for the differences in rates of learning and skills acquisition and were unwilling to adjust the required levels of output for individual workers to take account of individual differences. Reps in the NHS Ambulance service were acutely aware of the problems of working under high pressure with long hours, stress and shift working being additional factors in making their jobs unsustainable and were particularly conscious of the personal development divide between older and younger workers, with younger and better qualified workers had many more opportunities to exchange their physically and mentally stressful jobs for more sustainable work.

5.2 Support for elements of active ageing agenda

Our researchers assessed the “state of play” over active ageing in their respective countries, based on the evidence of their interviews and workshops, with particular regard to the support or otherwise of social partners for elements of the active ageing agenda.

5.2.1 Acceptance of the active ageing conceptual framework:

Our researchers’ assessments of participants’ attitudes (i.e. employers and union reps) on the proposition that the concept of “active ageing” has value as a conceptual framework.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Spain | Italy | Poland | UK |
| “Active ageing” has value as way of seeing things – a conceptual framework | agree | agree |  | agree |

*Quotes and comments on proposition that “active aging” has value as a conceptual framework:*

Spain: Our Spanish research partner comments on the following quote that it is, “…unique since we only met one company claiming to have an active ageing model. In this case the explanation is that the company was itself involved in the sector of caregiving to frail elderly people. While in general terms, the tone of the comments and reflections were prone to acknowledge the importance of older workers and pay close attention to their needs, specific and elaborated comments on the active ageing conceptual framework were scarce.

Italy: Trade union representative (Rome workshop 1) “*There are two typologies of ‘active ageing at work’ policies: those which support older workers in the transition to early retirement in order to promote the intergenerational exchange and those active policies at work aiming at promoting an adequate permanence of older workers in their job position. There is not only one concept of active ageing as there are three different typologies of age: biological age, functional age and perceived age.”*

Poland: No comments

UK: While social partners found the concept of “active ageing” helpful, it should be stressed that its framework was not previously understood by them in any developed way. Union reps and employer representatives were not familiar with the term “active ageing” but seemed happy enough to use it. Some employers had an interest in pursuing changes in discrete areas such as talent management and recruitment, managing performance, learning and health and well-being and other elements of an active ageing framework. That said, most had not adopted any broader, integrated approach. The term “active ageing” did not appear to incur opposition but there was rather a low level of current understanding of it.

*5.2.2 Acceptance of the idea that ‘health’ is an important part of the active ageing framework:*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Spain | Italy | Poland | UK |
| Health is an important part of the “active ageing” framework | Agree | Agree |  | Strongly agree – but not the whole story |

*Quotes and comments on evidence in relation to health as part of an active ageing framework:*

Spain: Health is considered a part of the “quality of life at work” framework (one that it is not necessarily linked to the ageing process) but not a part of the “active ageing” framework as of yet. However, during the workshops and interviews it was often argued that attention to health and legislation about health care at work might be a good start to introduce the “active ageing” framework in the workplace.

Human resources manager (Private Sector workshop): *"At the age of 60 our workers arrived in very weak health conditions, they looked like elderly people, absolutely old. Since then, health has been improving because jobs are being adapted very much and any job that is considered painful is going to be restructured to remove excessive arduousness.”*

Union rep (Public Sector workshop): *“I was thinking that as we have a tool that is the regulation on occupational health, and the truth is that we have always had it ...maybe this tool is underutilized and it would be interesting to take it back as it is already integrated in the labour relations. It might be a tool to facilitate communication with the company… to begin to set up regulations on aging, to facilitate the emergence of habits of negotiation on the ageing of the workforce.*”

Italy: Trade union representative (Modena workshop): *“Work-related diseases affect worker’s capacity to do some working tasks. From this point of view, population ageing has also an impact in the occupational health and safety management as specific PPE are needed”*

Poland: No Comments

UK: Social partners were seen to be in strong agreement with this statement. There were however, numerous expressions of need around other issues than health, making it clear that reps did not see health as a “silver bullet.”

Housing Association Manager: *“I am interested in the whole workplace well-being narrative. The way things are going we are all going to have to work a lot longer. Seeing as we spend so much time at work, it is becoming imperative that this kind of social dialogue to happen. However, I am not sure that my organisation is fully on board with this.”*

*5.2.3 Perceptions on how far reps and employers agreed that* ***working*** *is central to “active ageing”*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Spain | Italy | Poland | UK |
| Working is central to concept and practice of “active ageing.” | Disagree | Disagree |  | Agree |

*Comments and quotations on working as central to active ageing:*

Spain: Our Spanish research partner commented as follows:

*“In general, the accepted idea is that active aging is linked to the well-being of the person and that this well-being does not always correspond to keeping working. Therefore, the current context invites more to connect active ageing aging with working less than the opposite.”*

The comments of social partners appeared to accept the idea of working being a component of active ageing but were nonetheless somewhat equivocal:

Employer (Private Sector, interview): *“Employment, I believe, is a way to stay active and alert at all times and grow old in a way, I would say, perhaps, with better capacities. However, on the other hand, I understand that active ageing does not have to go hand in hand with employment; a person who has finished his working life can age very actively without having to be in the labour market.”*

Union Rep (Public Sector, interview): *“... right now when a person reaches a certain age what companies are trying to do is take him out of the way and hire younger people. …the tendency is that someone does not get older while in the labour world.”*

Italy: Employer’s representative, Rome workshop 1 *“The point is to implement active ageing policies at 360 degrees as active ageing does not regard only the traditional employment contract but it refers also to other aspects, for example, volunteering. It is important to keep older people active in the society”*

Poland

UK: The ability to remain in work was the main focus of our discussions but there was some acknowledgement that active ageing also applied to things beyond work. There was strong agreement with the idea that people should be *allowed* to work as long as they wished, with only a few union reps voicing the idea that there was something anti-social about extending working life, on the basis that it might deprive younger people of work opportunities. There was also recognition that working in later life was to some extent a matter of “horses for courses,” a good idea which may not suit everyone.

It was clear that working later in life would only be possible if people were protected from working conditions which wore them out or which made them unemployable in new jobs where technology and methods had moved on whilst the older worker had stood still. There was also recognition that people should as far as possible be able to continue in later life to contribute to the wider society and pursue hobbies, care for their families, act as mentors, play useful and active roles in their union and do other such things which would not count as paid work but which would contribute to the greater good of society.

*5.2.4 Assessment of participants’ views on retirement as a loss*

Did employers and reps agree that the retirement process inflicts a sense of loss on individuals as they give up work?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Spain | Italy | Poland | UK |
| Did reps and employer participants take the view that the retirement process inflicts a sense of loss on individuals | Yes | No |  | Yes |

*Comments and quotations on retirement being experienced as a loss:*

Spain: Researcher comments - Even if we could not say that the idea of retirement as loss has been presented in the majority of our interviews and workshops, social partners are aware of that linked to retirement. That said, whenever the feeling of loss has been mentioned it has been acknowledged that neither employers nor trade unions do anything to prevent it.

The following observation by a union rep, highlights the experience of loss by retiring workers:

Union rep (Public Sector, interview): *“In most cases, when they retire early, at least it is the experience that I have with the people that I see around me, they tend to break down. They do not react when they are fired, when the employer gets rid of them. All of this is something that affects them very negatively in their personal life.”*

Italy: Trade Union Rep (Rome workshop 3): *“Considering that retirement does not represent the end of the active live, work would certainly help older people’s psychological well-being. Keeping a large part of Italian population active in social, political and cultural participation would have good implications for wider society”* Comment – I don’t understand therefore, why you have answered “No” to the above question. Please reconsider and if you think appropriate change answer

Poland

UK: This was not *explicitly* tested in the UK workshops, but was implicit in some of the comments we heard, citing individual cases where retirement had been unexpected or unsought.

5.2.5 Assessment of whether employer and reps agreed that *active ageing is broader than working on in later life,* and was there awareness of the scope of this wider dimension to it?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Spain | Italy | Poland | UK |
| Did reps and employer participants understand / take the view that active ageing is broader than working on in later life and was there awareness of the scope of this wider dimension? | Yes | Yes |  | Yes |

Spain: Generally speaking, in Spain the idea of active ageing is mostly linked to maintaining the well-being of retirees. In 2012 a survey of a sample of people aged 50-69, concluded that 61.7 per cent of interviewees would not have kept on working even if a suitable opportunity had been presented to them. In general, work and ageing are not two paired terms for Spanish people.

Employer (Private Sector, Interview): *“Normally active ageing has made me think not of people 50 years old but of much older people, right? [Active ageing] was about how to get to older age, to older age’s maturity, when you're almost out of the labour market, it is about how to keep yourself active ... that's what I get, that's what I understand by active ageing.”*

Italy: Trade union representative (Rome workshop 1): *“The concept of “active ageing” does not include the specification “at work”. The explanation is that active ageing is not only about work. Not all active ageing policies are related to work. Active ageing is also about keeping active older workers that have abandoned the labour market. Active ageing outside work is related to the importance and the role of older people in the society and it has important consequences, particularly regarding social services”*

Poland

UK: There was broad agreement on this wider dimension of active ageing, though it would seem to require greater articulation.

5.2.6 *Did reps and employers take the point that there is a gender dimension to working in later life with the genders having distinctly different perspectives?*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Spain | Italy | Poland | UK |
| Did reps and employer participants appreciate that there is a gender dimension to working in later life, with the genders having distinctly different perspectives? | No | Yes |  | Yes |

Comments and quotations:

Spain: Gender differences do exist when it comes to how people age well, but these differences have not really come up as part of the social agents’ discourse around gender, at least not with the social agents with whom we spoke in our workshops and interviews.

Italy: Trade union representative (Rome workshop 1): *“The most common PPE are those unisex and standardized that do not respond to the specific needs of workers, particularly older women. All these aspects should be faced together, it is not possible to speak about gender and ageing separately.”*

Poland

UK: Recognition was implicit in some comments but on the whole this was a neglected area.

***5.3 Expectations of “extended working life”***

Our researchers assessed the expectations of participants with regard to “extended working life,” giving their observations in response to the following five questions.

5.3.1 *Comparing expectations of younger and older workers*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Spain | Italy | Poland | UK |
| Did most of the workshop participants agree that older workers should be expected to work on the same job functions, and the same pace and intensity of work as younger workers? | No | No |  | No |

*Comments and quotations:*

Spain: Employer (Private Sector, Interview): *“But it is true that older people would have to change their job posts for more comfortable ones. Because, as I said before, the strength that you have when you are 20 is not the same as in your 40s and it is much less when you reach 50. For me, it is not just a question of strength but of capacity. It would be good to change responsibility positions so that older workers could make less physical effort and get more involved in work management and coordination.”*

Union Rep (Private Sector, Interview): *“I think you have to make an assessment of each person at each particular moment. We are in a sector -the industrial sector- where, really, the sector requires a lot of physical work, there is a lot of muscular wear and fatigue ..., and it is a bone and muscle issue. In the end, all of this affects the day to day work... Jobs that have to do with physical effort should be much more adapted depending on age and activity.”*

Italy: Employer’s representative (Rome workshop 1) *“Working conditions that imply repetitive tasks and challenging schedules with shifts starting early in the morning affect older workers particularly badly.”*

Poland

UK: Union reps generally believed that allowances should sometimes be made for older workers who may be less able to work to the same speed as younger workers or whose physical capabilities had been reduced to some extent. They supported the idea that the design and pace of work should be adjusted for them, although they were sceptical that employers would agree to this. The reps believed that giving older workers the opportunity to transfer into new roles (including mentoring younger workers) would be a humane action and make good business sense. This view was supported by a number of our experts including an occupational health physician (consulted and quoted earlier (see page xxx)) and some of the employers. (Quotes needed)

5.3.2 Adjustments to alleviate arduousness of work:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Spain | Italy | Poland | UK |
| Did workshop participants express *negative or positive views on the idea of making adjustments to alleviate the arduousness of work* for the older worker and support working longer? | Both negative and positive views | Negative views |  | Mainly positive |

*Comments and quotations:*

Spain: In all the workshops and interviews, we discussed the need to adapt work to suit the age and capability of workers - the benefits that would ensue for workers and for the company were pointed out.

Union rep (Private Sector, interview): *“If we want professional improvements we will have to take advantage of the training and experience of older workers. Of course, we will also have to consider job quality for those workers, because physical and mental ageing is a fact. Therefore, we will need to consider ways of helping older workers by them working fewer hours whilst contributing their experience… There could be the possibility of extending working life voluntarily —yes, I am* in *favour of a voluntary choice, but with possibilities to reduce a large percentage of working hours.”*

However, it was also recognised that making adjustments can sometimes be problematic in terms of work organisation (for example keeping the correct numbers of staff on night shifts) and productivity (ensuring that employee numbers and necessary skills are present in a given context).

Human Resources Manager (Public Sector workshop): *“Many of those agreements, [on the adaption of work] are actually… incompatible, you might say, with the provision of a service with a certain degree of normality. That is to say, if the measures are not applied very carefully, they are incompatible with the standards of work and output levels required.”*

Italy: no comment

Poland

UK: Views on adapting the job to better suit the worker, were mainly positive but in general it seemed that employers were not proactively initiating changes on their own behalf. Numerous examples were given by reps of situations where management had failed to make adjustments and denied older workers opportunities to adapt to new roles or remain actively engaged with work. The following exchange took place with an occupational health physician who had considerable experience of advising employers.

Researcher: *“Have you seen examples of any concessions that have been agreed to make it easier for the older worker who has slowed down and whose productivity may have declined…?”*

OH Physician (London Webinar): “*No, sadly not. This is why I make the point. I don’t see any evidence that it being given consideration. Quite the reverse in fact. More often than not I will be dealing with a female work force who are performing roles such as part-time cleaners. Important income for them but physically quite demanding and people with perhaps not great health… As more and more of these roles are being outsourced… and more focus is on getting the job done in a number of hours and making sure that the client is kept reasonably happy, rather than concentrating on whether or not the worker is going to be able to do it… I don’t really see that there is any sign of any movement in this regard.”*

5.3.3 Did asking for adjustments lead to negative consequences for older workers?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Spain | Italy | Poland | UK |
| Did any of your workshop participants take the view that making adjustments for older workers would “single them out” for extra attention by management and that this might have negative consequences? | No | No |  | Some did but not widespread |

*Comments and quotations:*

Spain: Union Rep (Public Sector workshop): *"A worker who has had a health problem and cannot perform his job is being offered by the company only one way out: quitting his job through permanent sick leave. Then other workers see what has happened and because of that they are afraid to undergo a medical examination that may show their difficulties to do their usual work … Well, they are afraid that the evaluation of their health could be ‘cannot do his usual work’, and then the company may fire him, that's the thing."*

Italy No comments:

Poland No comments:

UK: In the main, reps believed that management would not be likely to want to “bother” with making such changes, particularly if they were costly. Hence, concerns may have been less to do with being victimised for asking for adaptations but a lower level feeling that it may be unwise to attract attention by asking for changes. In one workshop, responses of management to the needs of workers with age related mobility problems were contrasted with the duty laid on employers to make “reasonable adjustments” to accommodate disabled employees.

5.3.4 Did older workers fear repercussions for asking for help?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Spain | Italy | Poland | UK |
| 4 Did you hear any views in your workshops that older workers may be worried about being pushed out for asking for help to continue to do their work? | Yes | No |  | Some did but not widespread. |

*Comments and quotations:*

Spain: We noted that in some cases, a lack of understanding of active aging and high job instability in some positions, coupled with the need to keep contributing to the public pension system, may lead some workers to fear that showing any weakness may put them at risk in front of the company.

Italy

Poland

UK: Some union reps made comments which implied that older workers would not generally ask for help (even if they were beginning to struggle with their work) either because of an element of fear on the part of the worker or because they simply did not like to admit that they were slowing down or may not recognise that they had done so. The reasons for failure to communicate their concerns following statement from a rep in the financial services workshop, suggests that fear of management using the “capability procedure” against individuals is a factor.

Union Rep (Financial Services Workshop, Newcastle): *“It is very fast changing. Really fast, the processes can change daily, weekly, and I do find that the older generation… doesn’t deal with that as quickly as younger generation….I feel as if it could be of benefit if at some point, on a voluntary basis, when you get to a certain age and you still need the job, if you were able to say, “Actually, hand up, I’m not as quick as I used to be. …Is there something else I can maybe manoeuvre into?” [Then you could] do it more in the manner of a meeting round a table, “Let’s have a chat, what’s next for me?” Rather than the way I think the way Barclays has done it, in our call centre when they are more likely to say, ‘Alright, you’re not knocking these figures out.’ That’s an invitation to a capability hearing, because this is the type of stance they’ll take. They’ll say, ‘Okay, your figures are less than this person’s. We all take the same calls….’ And then they want some kind of an explanation, implying you are not up to the job.”*

Facilitator: “*Your experience is that people who might need some adjustment aren’t asking for it?”*

Rep 2: “*They’re aware that they’re not as quick, and by the same token they feel harassed, they feel a bit under pressure, and they feel as if they wish they’d retired.”*

5.3.5 Low key ageism

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Spain | Italy | Poland | UK |
| How far did your interviews and workshops provide evidence of a measure of “low key ageism” continuing to operate? | Agree – there is evidence | No evidence |  | Some evidence |

*Comments and quotations:*

Spain: Comments on low key ageism in some instances pervaded our field work. There is, for example, a strong belief that younger workers fight for their own interests disregarding the accumulated expertise and wisdom in the hands of older workers.

Line Manager (Private Sector workshop): *“I have always considered that the people who are older, who have more experience, have opened a pathway in life for me. I have considered them, valued them, respected them and I have taken them into account. However, in our company this does not happen. I feel that the value of the older worker is being lost.… Young people are not capable of assessing the effort made in the past by older workers, nor of transmitting such a positive appraisal to older workers. I do not see it. It is absent, in my point of view.”*

Italy: No comments:

Poland:

UK: The examples below describe a form of “low key ageism” in that obvious needs of older workers to be given some kind of concession are being completely ignored, in an environment where the pace of work is intense and it is clear that the older worker is struggling to survive. (This discussion and the examples given, are contiguous with the responses given to the previous question).

Rep (Financial Services Workshop*: “Whether you’re 15, 16, or 75, you’re still expected to hit the targets that are set by the company. The targets are not set for different age groups or levels of experience as such. So, you’re all expected to hit that same target range. It doesn’t matter how old you are, what experience you have….* *You go through what’s called a coaching time, so you’re given some leeway there but that is it.*

*“They don’t take into account people’s circumstances, whether it’s age or anything else. They just look at the bottom line. Is that department hitting that target? Okay, are the people in that department hitting that target? Are the teams in that area hitting that target, and are the individuals hitting that target? So, it doesn’t matter what your age is, and if you fail to hit those targets, it doesn’t matter how old you are, your manager is going to come down on you because you’re not hitting the company expectations.”*

In another case, workers in a call centre were dealing with cases of credit card fraud. A group of employees had been given responsibility to handle this sensitive area of activity and all had been put through a short training course on the procedures to follow. Two older workers were slower to pick up the new learning than other younger workers, but instead of putting them on further training, the company put them into call answering roles where mistakes were made, for which the employees concerned were then immediately blamed. The union rep commented that this resulted in their leaving the company early under a cloud of blame, which could have been avoided if the additional training had been provided timeously.

1. **Intergenerational issues**

In this section we will consider whether our workshops and interviews revealed inequalities and conflicts between the generations. We ask not only how far these may have featured in the workplaces of participants, but whether there are *stereotypes* of the different generations that may be influencing union reps, workers and their managers, if so what they consist of. We were keen to find out too whether there are specific examples of “generational divides” that can be identified and finally, whether on the contrary, there are positive examples of intergenerational solidarity which can inform good practice in working towards active ageing.

*6.1 How important did intergenerational issues seem?*

Question: To what extent did your workshops / interviews suggest that intergenerational issues are important among the social partners and workforces in your country?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Spain | Italy | Poland | UK |
| Not important, |  |  |  |  |
| A bit important, | X |  |  |  |
| Quite or very important |  | X |  | X |

*Comments and quotations:*

Spain: Researcher’s comment: “We feel that importance and visibility given to intergenerational issues are growing.” In some of the following quotations, intergenerational issues seem to be assuming more importance, with concerns being expressed as to how issues of intergenerational interests can be practically reconciled.

Line Manager (Private Sector workshop): *“The company is giving a lot of opportunities and space to all these new and younger people who are arriving now, who enter with a hunger to take on the world, who contribute with many ideas, who take very fast decisions, who all seem to do very well,… but there are still older people in the company and we can also give our vision, our experience,… and I do not know.”*

Line Manager (Private Sector workshop): *“The boss is not aware of the situation that you live and work in and I am reluctant to go to the office to say to him, ‘Hey, look, I feel discriminated against by my colleagues who are younger than me and have another way of thinking about things.’ I cannot say to him, ‘You are the boss and you are allowing a gap between the generations because we do not understand each other’".*

Human Resources Manager (Public Sector workshop): *“How are the interests of young and old workers to be reconciled in our company? Until now it has been done very little and in a bad way. It is now when you have to start taking things seriously, because otherwise the problem will be very big.”*

Italy: Employer’s representative (Rome workshop 1) *“one of the problems of the lack of implementation of active ageing policies is related to intergenerational dialogue”* (Employer’s representative, Rome workshop 1)

Poland:

UK: There were few if any examples of different generations of workers being in conflict in terms of relationships, though there were some instances where older workers felt that there was a lack of equity because younger workers were able to benefit from different levels of formal education and qualifications. (See next question).

*6.2 Intergenerational divide in career and qualifications*

Question: How far did workshop participants express the view there is a “generational divide” in terms of formal qualifications and career paths open to older and younger workers?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Spain | Italy | Poland | UK |
| Not important, |  |  |  |  |
| A bit important, | X |  |  |  |
| Very important |  | X |  | X |

*Comments and quotations:*

Spain: The following comment from a Human Resources Manager reveals, on one hand, a consciousness of generational differences in educational background and training, and on the other, seemingly, an element of regret that practical experience is somehow devalued by the higher educational standards now common in the HR profession. The implications in terms of career opportunities are implicit, in this instance.

“People coming behind us have by far more capacity to learn and much more qualifications than us. Experience is no longer as valid as it used to be. I must recognize that I have a lot of experience, but I don’t even know English. And now the human resources specialists coming with a Master degree arrive with novel ideas, and you really don’t know what it is exactly that they are talking about."

Italy: Trade union rep, Rome workshop 3): *“Young people are generally hired with non-standard employment contracts, thus they feel their condition more precarious than older workers”*

Poland

UK: The intergenerational qualifications divide was a major concern of our trade union representatives from the NHS Ambulance Service. They were aggrieved that a two tier workforce was emerging in which younger paramedics who held university degrees had far more career development and change opportunities than the older paramedics, who were experienced in the job but denied opportunities to move to managerial positions. Reps felt this was particularly unfair as the same longer-serving (but less well-qualified) staff were more likely to be suffering from various physical or mental conditions arising from the arduous nature of their work. Union reps in the non-profit sector also commented on the intergenerational qualifications divide. They asserted that progression up the salary scale in their organisation had made them more vulnerable should management seek to cut costs by reducing head counts. One practical example was given of older workers not having their fixed term contracts renewed and effectively being replaced by younger (less well paid) employees.

Union Rep (non-profit organisation): *“But the fear is because we’re reasonably well-paid, thankfully, in our jobs, (we may be more vulnerable). But then, there’s lack of motivation… and they’ve been there for years, but there’s a very poor chance of getting another job when you’re 60, 62, and 50s. So, ‘you are stuck...’ And if you were to get another job, comparably, the wage is going to be much lower.”*

*6.3 Generational divide and youth unemployment*

Question: Did workshop participants and interviewees connect the intergenerational divide in some way to youth unemployment:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Spain | Italy | Poland | UK |
| No, not at all |  |  |  |  |
| Yes, there is a link but it was not strongly expressed | X |  |  | X |
| Yes, strongly linked |  | X |  |  |

*Comments and quotations:*

Spain: Paradoxically, the "generational divide" has appeared in relation to the unemployment of older people. When the latter get a job, these people do everything possible to work intensively (as many hours as possible) in order to be able to contribute enough to receive a retirement pension. In this context, other younger workers may complain that these older people are favoured.

Union rep (Private Sector workshop): *“Those women have been working all their lives but they [did not have a formal contract and thus] have not contributed to the public pension system. Now they have found a company that gives them a proper contract and they want all the hours they can get because they want the highest possible category because they want to receive a pension.… There are younger workers who say, ‘I am not going to work fewer hours just because I am younger, they should have found this job sooner’”.*

Italy: Employer’s representative (Rome workshop 3) “pension reforms have reduced the possibilities to hire young workers” Could we please have a bit more information here? It would be helpful if you could explain.

Poland

UK: The issue of youth unemployment was very little mentioned in our workshops and interviews. There were some comments but there seemed to be very little conviction that older workers continuing in the workforce had any impact on the employment prospects of younger workers. Whilst there were some comments (notably in the case of an overseas aid NGO in the not for profit sector and by a representative of a freelance interpreters’ union group in the same workshop) that younger workers were displacing older workers) this was not a commonly held view.

Union Rep (NGO): *I think that somehow you are going to notice that older people have started to disappear from the workplace. We have had so many restructures and there’s quite a lot of movement going around… Mostly localised programme staff in the regions. But I don’t think we are doing anything specifically for older workers or to support older workers, other than perhaps an arrangement in terms of redundancy packages… And there’s also this thing where we’re supposed to be giving people opportunities, whereas in reality… you know that people make their assumption when you work at a certain age that’s not even that old you know, (like when you get to say year early 40s) (they assume) that you don’t want progress in the workplace. They think you don’t want to travel… And the reality is that the people with the old contracts are on better conditions… [So the older worker will not be offered a new contract.]*

*6.4 Issues linked to exclusion of older workers*

Question: Which if any of the following issues were mentioned by your workshop participants as a means or symptom of exclusion of older workers.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Spain | Italy | Poland | UK |
| Casual work |  |  |  | X |
| Promotion opportunities | X |  |  | X |
| Pay levels or increases |  |  |  |  |
| Bonuses |  | X |  |  |
| Training opportunities |  |  |  | X |
| Organisational culture including how older workers are seen by co-workers | X |  |  |  |

*Comments and quotations:*

Spain: Our Spanish workshops revealed some striking examples of intergenerational hostility. How typical these were of intergenerational relations, it would be interesting to know.

Union Rep (Private Sector workshop): *“Some younger people comment on 50+ co-workers: ‘Look at her, she can barely do her job, she is not in good condition to care for anyone but herself”. Such comments are hurtful to ourselves as a group, but it's true that they are made. Younger workers see you and they see your age and since you've been in the company for a while, they insinuate that you should leave so that they are able to get your indefinite contract.”*

Union Rep (Private Sector Workshop): *“They put pressure on you, because you are doing the job of an older person who is not leaving but may be absent from work, a person who may not be in the company, then, of course, there is pressure, a lot; other times they tell you, ‘Leave soon, you are senile, why don’t you just go?’. They make comments of this type.”*

Italy: Employer’s Rep (Rome Workshop 3): “Older workers (from 40 to 60 years old) are even weaker than young people that enter the labour market for the first time, as for the latter there are tax incentives for open-ended employment contracts, apprenticeship schemes, etc”

Poland:

UK: Reps gave examples of older workers being recruited into casual or flexible working types of jobs, being overlooked with training opportunities and promotion or extension of a contract (expand and find examples)

*6.5 Participants’ views and stereotypes of older workers:*

Question: Did workshop participants broadly go along with the prevailing (widespread) assumptions about older people and their potential or characteristics as workers, or did they seem to challenge them?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Spain | Italy | Poland | UK |
| Went along with general assumptions |  |  |  |  |
| Seemed to challenge them | X |  |  | X |
| Not an issue discussed |  | X |  |  |

*Comments and quotations:*

Spain: Employer (Private Sector, interview): *“The older worker who gets tired because of his manual work, may have other skills and experience; and experience is possibly more important than physical strength.”*

Line manager (Private Sector workshop): *“The company is giving a lot of opportunities and space to all these new and younger people who are arriving now, who enter with a hunger to take on the world, who contribute with many ideas, who take very fast decisions, who all seem to do very well,… but there are still older people in the company and we can also give our vision, our experience,… and I do not know.”*

Italy: No Response – please provide quote or reflection and choose an option in the above table

Poland

UK: There were two aspects to the ways participants seemed to think about being an older worker. On one hand both employers and union reps tended to emphasise their *enduring capability* because of greater experience and knowledge. On the other hand, both groups also acknowledged that age brought a tendency to slow down. Union reps argued that allowances of some kind should be made for the older worker. Management participants in the workshops did not seem unsympathetic to this idea, though the occupational health physician whom we interviewed stressed that it was rare in practice for such allowances to be made as did union reps in the NHS ambulance service and the construction sector workshop.

Reps’ complaints were to the effect that management did not make enough allowances for the older worker’s increasing physical limitations and at the same time, they failed to appreciate that older workers could contribute valuable knowledge and skills to the organisation if called upon to do so. Deeply held views were forcefully advanced to the effect that management *ought* to make better use of older workers’ skills and know-how, particularly in supporting younger workers. One rep from the NHS ambulance service gave the example of older workers being tougher and more resilient than younger workers when it came to dealing with the emotionally disturbing experiences encountered in the job. On one hand, he argued, the traumatic aspects of work as an ambulance were a reason for *not* expecting paramedics to extend their working lives, but on the other hand, older workers had a measure of toughness in dealing with the higher levels of stress and trauma, which younger entrants to the ambulance service faced but without the same resilience to cope and less experience in the job.

Union Rep (Ambulance service): *“They reckoned…when we first started, the average life span for a paramedic would be about 15 years. Now, it’s down to seven. They reckon in another two years it’s going to be down to five. And that’s going to massively impact…you know. They’re 20 now. They’re going to have to retire, won’t they, if they ever get there? Whether you are 20, 30, 40, 50, 60, we are exposed to stuff that the average person will never see in a lifetime.”*

* 1. *Intergenerational solidarity*

Question: Did workshop participants give examples of measures taken, or suggest ideas for future action, that could be seen as examples of “intergenerational solidarity”?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Spain | Italy | Poland | UK |
| Yes they gave examples of measures taken | X | X |  |  |
| Yes, they put forward ideas for future actions |  |  |  | X |
| Not an issue we discussed |  |  |  |  |

*Comments and quotations:*

Spain: There were times when the social partners acknowledged the value of intergenerational solidarity but they did not really cover down-to-earth measures to achieve it.

Line Manager (Public Sector workshop): *“One of the things that can contribute or we can bring to those who now have a certain age is our experience. I believe that one of my functions right now is precisely to do with those who come behind, who are now the backbone of the company. I am no longer in that first line, then I must help them to learn, to rise, to improve ... " (line manager, public, workshop).*

Human Resources Manager (Private sector workshop): *“I have met many workers when they are about to retire who come and say, ‘I have taught everyone who has passed by here’. I'm not talking about team leaders but just ordinary workers.”*

Italy: Trade union representative (Modena workshop) *“An example of cross-generational solidarity flows from the national sectoral collective agreement (NCLA) of the banking sector. A provision of the NCLA renewed in 2015 invites the managerial staff to contribute 4% of their fixed salary to the F.O.C. (the National Employment Fund, set up in 2012 in order to create fruitful and stable employment by supporting the permanent employment of young people), to demonstrate solidarity between generations.”*

Poland

UK: In several of our workshops comment was made that older workers could perform useful roles mentoring others. For example in the NHS workshop a speaker commented:

*“… you know, you’re losing a lot of experience….You lose 30 years of experience in the blink of an eye from our organisation [when older workers leave early] and I’m pretty sure it is the same, probably in every ambulance service there is…But to them [the management] that doesn’t matter… The older person is not being valued for that 30 years’ experience where they could then go and teach. You know, [the older workers] are just seen as dinosaurs.”*

In our session with K-Com managers, several contributors commented enthusiastically on the potential uses to which they could put telephone engineers who were no longer able to perform installation and repair work which entailed climbing telegraph poles.

K-Com Manger – Customer Services: *“I would snap them up tomorrow. They might not want to be climbing up poles, but to me, in my area, they would be really skilled people that would have a lot of experience, and I think that’s the point. It’s that this ‘stepping down’, or whatever you want to call it, doesn’t necessarily have to be your part-time job in a garden. I have a lot of people who work reduced hours. We’re quite flexible; we accommodate people, parents, people that are prepping for retirement, all of that. But we’ve got a really good skillset in our business, and … we tend to think to ourselves, ‘They can’t climb the pole anymore.’ So [maybe] they will go off somewhere else, [but we can avoid this by] looking internal to our business and I think what opportunities do we have within our business or people who want to wind down?”*

1. **Responses by management to active ageing challenges**

In this section we will consider some management responses to the challenges of active ageing. In running our workshops, we shared examples of some innovative approaches to promoting active ageing, in order to gauge the reactions of participants. For the sake of completeness we will also include mention of some of these innovative approaches in this section, noting in particular the comments made in response to them by our workshop participants. Our collected good practices and ideas for the toolkit produced as part of the ASPIRE project will reflect both the ideas thrown up in the workshops and interviews and those generated less directly.

*7.1 Productivity*

Question: Did any of the workshops or interviews supply examples of the following kinds of actions to boost productivity?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Spain | Italy | Poland | UK |
| Early retirement to get rid of “low productive” older workers | Yes, examples were given | None given |  | Yes examples given |
| Use of older workers as a non-permanent highly flexible form of labour | None given | None given |  | Yes, examples given |
| Retention of older workers to avoid recruiting and training younger workers | None given | Yes, examples given |  | None given |

*Comments and quotations:*

Spain: Our researcher observes that in Spain, “Perception of ‘low productivity’ is very much linked to the idea that higher labour costs are associated with older workers.” The following comments suggest strongly that rather than seeing active ageing as a means of enhancing productivity and economic performance, it is seen as an additional burden on management.

Union Rep (Public Sector workshop): *"The issue of aging in our company has never been put on the table, other than to take workers out of the way via early retirement and bring in new people, who also are a much smaller economic burden for the company. This is also an added value."*

Union rep (Private Sector, interview): *“The employer's reasons are always the same: he wants a reasonably viable company, economically good and everything that does not help to reach a good performance, he thinks to himself, ‘Why do I need this?’ If an employer comes here and he is sincere, he will say that. If we tell him that active ageing is a good policy for his workers to be better, he will say that active ageing is secondary. He will say, ‘If I am able to, I will introduce some active ageing measures, but these measures won’t be a priority’. The priority is with the economic performance.”*

Italy: HR Manager (Rome workshop 2): “*My company is interested in extending working age because older workers have skills that are not available in the labour market and that cannot be developed within the organization in a short time. For this reason, there is an ‘alarm’ in the company, a fear that these people can access to early retirement because their professionality is hardly replaceable”*

Poland

UK: Union reps and employers shared examples of employers who had concerns about the declining productivity of older workers, frequently with respect to their speed of working. Some employers express concerns that the removal of a legal right to impose “mandatory retirement”, will result in them being forced to apply “capability procedures” to some employees, whereas formerly they could wait for the employee to retire at the normal retirement age. On the other hand, union reps were critical of the way workers could be heartlessly “got rid of,” because they were no longer of use to the company.

Union Rep 1 (Construction sector): *“… with someone retiring, they just disappear, and that’s it, you say, ‘I haven’t seen him for a while.’”*

Rep 2: *“Or you go the funeral.”*

Rep 3: *“Or you go to the funeral.”*

Rep 1: *“The last company I was with, XXX, I knew a machine driver who spent 45 years and he loved the company and he was going on about his retirement….He worked for them on Friday, he didn’t work for them Monday. No acknowledgement of the service, no hand shake, that’s it, you’ve just don’t work for them no more. You’re pension age, you can go now. You are a resource, you are like that digger over there, you are a resource….Once the digger’s knackered what happens to it? It goes to the breakage yard. Does anyone talk about that digger, that’s gone? No. That’s all we are, really, if you look at it.”*

Such feelings about employers’ attitudes were by no means universal however. The Financial Services sector contained some employers which were seen to be more tolerant of workers who were slowing down.

Union Rep (Financial Services): *No, the managers, generally, are good, most of them are company orientated, and they back the company 100 per cent, but at the same time, they will be understanding if someone has got special circumstances - probably because they have to be by law - and make sure that they do everything right. There’s no undue pressure put on anybody who’s of a certain age, whether young, middle-aged or towards the elder age group, which I’m getting towards. There’s no pressure that way. There are no redundancies. People who have been there a long time, that’s what they’re waiting for, to leave with a severance payment, but realistically they’re not going to get it. On the other hand, the company worldwide would probably be quite happy to say, ‘Well, if you leave by natural means it’s a money saving object,’ without saying, ‘You need to leave. You’ve hit the retirement age, you’ve got to go.’ I’ve got people who are working past the retirement age. Some work part time, some work full time, but when you ask them how old they are you’re surprised because they don’t look their age and they don’t seem it. That’s broadly what I get.”*

Contingent working, including people who are classified as “self-employed,” has increased quickly in the UK among older people since the economic downturn in 2008-9. However, it is still a very small minority of workers who are affected. The growth in self-employment has been most significant among people over 65, accelerating rapidly from the second quarter of 2009. ONS figures show that the fastest growth rates in self-employment are among those with degree level qualifications. While a tightening labour market may result in more employers being readier to offer part time working, the rise of the “gig economy” continues to support extreme forms of self-employment, including zero hours contracts. Our workshops offered only a few insights into how these developments are being received in the workplace.

One union rep in an NHS Trust was critical of her employer for failing to introduce flexible working to encourage recruitment of working women and others with caring responsibilities. Another commented that there were too few part time jobs available to fill demand, and very few opportunities to job share.

Rep (NHS /Voluntary Sector Workshop) *“I find that despite all the rhetoric about flexible hours and part-time jobs, if you look … at the number of part-time jobs, it’s a tiny fraction of the number of jobs there are overall. So I think there’s been very little movement on the whole concept of job sharing and part-time work and so on.”*

7.2 *Sustainability*:

The idea that jobs should be “sustainable” is a key element in EU policy around active ageing. Our research partners considered awareness of the sustainability argument in the following terms.

Question: Did participants in your interviews and workshops believe that employers were alert to the business case for older workers?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Spain | Italy | Poland | UK |
| Yes |  | X |  | X |
| No | X |  |  |  |

*Comments and quotations:*

Spain: No examples

Italy: No examples quoted or comments – can you find one?

Poland No examples

UK: Responses from participants were mixed. Union reps were often critical of employers for failing to see the business case for employing older workers and generally for failing to consider what needed to be done to make jobs more sustainable for the older worker. On the other hand, some employers seemed to see the business case for employing older workers and therefore for making changes in their working conditions to ensure they remained in the workforce.

Employer, Small IT Business, London: *“Of the last six people we have hired, three have been recent university graduates and three have been older workers whom we have engaged on a flexible basis. All three are 60 plus and one is 65 plus. They were hired mainly because of the experience they can bring to the technology team but we have hired them on a very flexible basis. They can work from wherever they want to work and for the days and hours they want to work. This arrangement has been what has attracted them to join us rather than continuing to work for big corporates.”*

In contrast to the above positive example of an employer regarding older workers as a “business opportunity,” union reps commented on employers’ failure to deter early departures. A representative of the Employers Network on Equality and Inclusion, recognised the rarity of employers in taking pro-active, pro-age measures:

Employer rep (ENEI interview): *“I am not aware of companies being actively age positive in the sense of putting policies into place to specifically support an older workforce.”*

(The same speaker subsequently qualified this by mentioning the Barclays Bolder Apprenticeship scheme as a specific age positive example of training older employees.)

*7.2.1 Examples supporting sustainability for older workers*

The research team looked for examples of employer interventions to support sustainability of work for older workers. The following responses were received:

Question: Did your participants quote instances of action being taken to help develop the business case? (Positive responses marked X)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Type of action | Spain | Italy | Poland | UK |
| Joint working groups on ageing and working |  | X |  | X |
| Management task group or team to lead development of age and work changes |  |  |  | X |
| Specific responses aimed at targeted group within workforce |  |  |  | X |

*Comments, quotations and examples cited:*

Spain: were there no examples?

Italy: Joint working groups on ageing and working: HR Manager (Rome workshop 2) “*Our company is carrying out an analysis within the different departments. These were carried out in order to highlight how the working population’s aging affects shift distribution, absenteeism and job protection”*

*Any examples of the other types of intervention mentioned above?*

Poland

UK: The following examples are given from the UK.

*Joint working groups on ageing and working*: The NHS *Working Longer Review Gr*oup is a rare example of a joint employer and trade union group working on age and retirement issues. It has worked nationally in the National Health Service, seeking evidence, commissioning research and producing tools and examples for NHS employers to implement locally in individual NHS trusts.

*Management task group or team to lead development of age and work changes:* Business in the Community *Age Project* has established a project with this intention. It has been a high profile campaign with tools and resources available on a special Business in the Community Age Campaign website: <https://age.bitc.org.uk/> Companies are encouraged to sign up for the BITC Diversity Benchmark and become a partner in the BITC Age at Work campaign. There has been no trade union involvement in the campaign however and the social dialogue potential of working with the unions appears to have been unrecognised.

*Specific responses aimed at targeted group within workforce:* A rep in the finance sector gave the example that his section within the company he worked for, was a popular place to put people who were looking for a career change. “It can be anyone but it tends to be people of older years.”

*7.3 Financing support for active ageing*

The research team was briefed to collect examples demonstrating new or different approaches to financing measures to support active ageing. The following shows our researchers’ responses to several forms of support and action we identified in our question.

Question: Were examples given in your workshops and interviews of specific measures to finance the changes needed to support active ageing?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Type of action | Spain | Italy | Poland | UK |
| Funds which are under the joint control of employees and employer in some way (bilateral funds) |  | No response but surely bilateral funds should be reported? Please respond |  | No examples quoted or given. |
| Collaboration with Government bodies |  | Is there really no hint of collaboration here? Could you perhaps reflect on this and see if a more nuanced response is possible? |  | Government Department for Work and Pensions and Centre for Ageing Better – see expanded note below. |
| Pension funds used to support work adjustments |  | Do bilateral funds include support from pension funds |  | No Examples given |

*Comments and quotations:*

Spain: No examples quoted. Social partners expressed their interest in knowing which governmental sources of funding are in place in other countries to support active ageing developments at workplaces.

Italy: Researcher’s observation: “The main legislative measures that Italy has used to promote later retirement has been the rise of the retirement age, the reduction of incentives for early retirement, and the introduction of some specific contracts – such as an on-call contract or casual work – that can be concluded with employees over 50. There are also economic incentives for employers that hire an employee over 50 with a fixed-term contract, such as the 50% reduction in employer contributions for 12 months. Contractual agreements foresee different measures to promote active ageing, including the following: transforming permanent full-time jobs into part-time and facilitating the reduction of working hours, or gradual retirement, to generate new job opportunities for young people.”

NB I have taken this from Paolo’s article “Active Ageing Responsive Legislation and Sustainability.” There are numerous good examples and extracts which it would be good if you could pick from here and associate with other parts of the Italian response.

Poland:

UK: The policy imperative of encouraging societies to age actively has been acknowledged for more than twenty years in Britain. (The term “active ageing” was used by the OECD and the International Labour Organisation in the 1990s to focus attention on reforms to retirement and longer working life, and the World Health Organisation similarly used the concept to emphasise the prevention of disease to support active and healthy ageing as early as 2002.) It is therefore surprising that there is no record of financial support for measures to support active ageing in the workplace being given by the UK Government. Similarly, there has been no support for partnership (i.e. employer/ trade union) approaches to this issue including in the area of age management. However, there have been several initiatives which have taken the form of non-financial support for extended working lives. These are explained below.

*Acas;* The quasi-independent, advisory and conciliation service ACAS advises both employers and employees in employment matters, issues guidance on dealing with age discrimination and complying with the legislation. The ACAS website “[ACAS working for everyone](http://www.acas.org.uk/index.aspx?articleid=1841)” contains much useful advice on age and work but in this context, surprisingly, makes no reference to working with the trade unions. Neither does it provide material support for a partnership element between employers and unions in promotion of active ageing. The publication, “[Age and the Workplace: A guide for Employers and Employee](http://m.acas.org.uk/media/pdf/e/4/Age-and-the-workplace-guide.pdf)s,” (ACAS, March 2014), is a comprehensive guide but again, contains no reference to consultation with trades unions or employee collective bodies.

*Department for Work and Pensions:* The Government has actively encouraged employers to work towards active ageing. Soon after the creation of Department for Work and Pensions in 2001, a new departmental team was established to commission research on *Extending Working Lives* and initiate campaigns. This continued over the ensuing period of Labour administrations to 2010 and then subsequently under the Coalition government up to 2014. The term, *Fuller Working Lives* at this point became the DWP’s brand for policy initiatives, including influencing employer policies and practices regarding the employment of older workers.

The *Fuller Working Lives* brand replaced both the *Extending Working Lives campaign*, and the [*Age Positive Campaign*](https://www.gov.uk/government/collections/age-positive#research-on-age-and-employment) (an employer resource and influencing mechanism since 2004). The latter paraded good employment practices, initially as “Age Positive Week” followed by other attempts to raise employer awareness of the benefits of employing older workers. None of these were specifically supportive of joint projects between employers and unions.

*Business Champion for Older Workers:* As part of the Fuller Working Lives campaign in 2014, Economist and pensions expert Ros Altmann was appointed as a “Business Champion for Older Workers”. Subsequently, after the election of the Conservative Government in 2015 Altmann was promoted to the House of Lords and became the new Minister for Pensions. In 2016 Andy Biggs, leader of the Business in the Community (BITC) Age at Work team and CEO of Aviva Life, was appointed as Business Champion for Older Workers’ to replace Altmann. While both Altmann and Biggs quoted good practice examples in large companies to illustrate the positive ways to “recruit, retain and retrain” older workers, neither specifically sought to reach out to trade unions or employee “voice” organisations.

*Business Strategy Group:* A business to business, “Business Strategy Group”, supported by the Government in 2016 on the initiative of Altmann (by this time Minister for Pensions in the Cameron Conservative Government), the services company Mercers and insurance company AVIVA, led to publication of, *“*[*Fuller Working Lives: A Partnership A**pproach*](https://www.lepnetwork.net/media/1492/fuller-working-lives-a-partnership-approach.pdf)*.”* This contains high level advice to employers but makes no reference at all to engagement with workers’ representatives or trade unions and fails to mention the idea of a “collective employee voice” in working towards active ageing. (The word “partnership” in this case must be taken to refer to an intended partnership between employers and the Government, rather than between employers and their trade unions.)

*Centre for Ageing Better and Business in the Community:* Similarly, the Business in the Community [*Age Campaign*](https://age.bitc.org.uk/issues/campaign-aims-0) supported by the [Centre for Ageing Better](https://www.ageing-better.org.uk/), a foundation supported by the state lottery, has supported initiatives relevant to the ageing workforce as an employer led campaign. Hence, attempts to project a social partnership collaboration on the issues of workforce ageing have been conspicuously absent from Government initiatives in the UK. Outside of Government, a separate CIPD / TUC publication [*Managing Age*,](file:///C:\Users\Chris%20Ball\Downloads\managingageguide%20(1).pdf) (2011 – TUC/ CIPD/ CROW) makes reference to a strategy of engagement with workers through their collective representation bodies (trade unions, staff forums or similar) in progressing towards active ageing in the UK.

*7.4 Collective voice to express needs of older workers*

The research team gathered examples of a collective voice used in issues relating to active ageing or in support of the position of older workers.

Each of our partner countries reported examples in which a worker collective voice had been used to express the needs of older workers. The following table summarises the means whereby this had been given effect.

*7.4.1 What form was taken in the collective voice as used in active ageing or related issues?*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Form of Collective voice used on behalf of older workers | Spain | Italy | Poland | UK |
| Collective bargaining or framework agreement | X |  |  | X |
| Employee network of some kind |  |  |  | X |
| Multi-generational working groups |  |  |  | No specific examples |
| Age dealt with under health and safety procedures |  |  |  | X |
| Age issues dealt with using individual rights |  |  |  | X |
| Statutory and contractual measures which carry the force of law, including multi-employer, national and regional agreements |  | X |  |  |

*Comments and quotations:*

Spain: There were some examples of age issues being raised as part of a collective bargaining process or in works councils…

Human Resources Manager (Private Sector Workshop): *“This theme [the ageing of the workforce] is very present in the consciousness of the people that manage the volume of our workforce. We have the possibility of negotiating collective agreements periodically with the workers. Both the works council and we (the employer) always raise the issue in the collective bargaining."*

… and some instances where as part of a health and safety procedure allowing requests for flexible working, age issues had been somewhat tangentially addressed.

Comment from Spanish research partner: *“Health is considered a part of the “quality of life at work” framework (one that it is not necessarily linked to the ageing process) but in Spain has not been identified as part of the “active ageing” framework as yet. However, during the workshops and interviews it was often argued that attention to health and legislation about health care at work might be a good start to introduce the ‘active ageing’ framework in the workplace.”*

(Comment to Mariano, I don’t understand why “health” has to be part of this formality of being in a specific box or “framework”. Surely if you are raising health issues you are going to have an impact on successful and active ageing – at least you are going to be trying to do so. Aren’t you? Why make this distinction. Please feel free to differ or explain - Chris)

This union rep offered an insight into the positive benefits of social dialogue (as a member of the works council) - Union Rep, (Public Sector, interview: *“When the company that makes the medical exams comes to visit us every year, as I am part of the works council, we usually talk to our older colleagues. We are interested in their abilities and the company, in my opinion, is always willing to adapt things because for them adaptation means a great saving of money.”*

Addressing the issue of facilitating flexible working to support older workers, this Human Resources Manager refers to a provision to reduce working time for older staff whilst dissatisfied that the provision has been extended more broadly. Human Resources Manager (Public Sector workshop): *“I have a provision that allows an extraordinary reduction of working hours for some staff. …. It used to be that once you reached 62 years old, you could reduce the working day by two hours. But we extended this principle to people over 60 years old. Unfortunately we have then had a huge amount of problems in running the services once this change was implemented.”*

Italy: Although the promotion of active ageing is not among the priorities of social partners in Italy, the issue is starting to be considered following some pressures from both workers organisations and organisations representing employers. Social partners recognise that active ageing is an issue of considerable concern, but it needs time to reach the top of their agendas. This helps to explain why active ageing measures in collective agreements are rare. Several statutory and contractual measures are provided to promote active ageing. The main legislative measures that Italy has used to promote late retirement has been raising the retirement age, the reduction of incentives for early retirement, and the introduction of some specific contracts – such as an on-call contract or casual work – that can be concluded with employees over 50. There are also economic incentives for employers that hire an employee over 50 with a fixed-term contract, such as the 50% reduction in employer contributions for 12 months. Contractual agreements foresee different measures to promote active ageing, including the following: transforming permanent full-time jobs into part-time and facilitating the reduction of working hours, or gradual retirement, to generate new job opportunities for young people.

Italy has relatively strong labour market institutions and a meso-corporatist form of labour regulation which takes place at different levels, including statutory legislation, multi-employer agreements at national, industry and regional levels, firm-level bargaining and Human Resource Management. The intersection between these sources is crucial to understanding the country’s strategies towards an ageing workforce. Those sources are complementary and coordinated in principle; most of the time, statutory legislation is expected to be implemented or complemented by collective bargaining provisions. Similarly, collective bargaining standards and other bilateral policies negotiated at sectoral level are expected to be applied via firm-level bargaining or HRM. Coordination between different sources of regulation is based on vertical and horizontal subsidiarity.

Partnerships between employers’ associations and trade unions do exist, and bilateral projects are implemented: not everything is based on traditional conflict-driven negotiations around opposing labour market interests. Part-time regulation in many sectors is the result of joint agreements between social partners representing both side of the industry. The same goes for health insurance policies defined bilaterally. It may be observed that these issues are not especially negotiated within an active ageing policy framework. Their justification and articulation may respond to other reasons (e.g. contrasting welfare state retrenchment, redistribution, increasing working time flexibility etc.), though indirectly they can be regarded as “active ageing measures”.

Move above comments to different section

According to interviewees, complementary or voluntary healthcare insurance is one of older workers’ main needs because, generally, ageing involves health problems and older workers use an important amount of their salary for healthcare. Therefore, sector health bilateral funds represent an important instrument to protect workers’ buying power also because they can be extended to workers’ family.

Bilateral bodies in many industries have set up pension funds to complement public pension schemes, as well as training funds. In addition, the most important national sectoral collective agreements introduced specific provisions for workers affected by chronic diseases, including specific forms of part-time work, hourly and daily leaves for medical care, job rotation programmes, more sustainable shifts and so forth. Although these provisions are not age limited, it is more likely that older workers use them. It may be the case that they are not explicitly or consciously linked to active ageing policies, but at the end of the day, the effect may be as positive as measures with a more overt link to an active ageing agenda.

Paolo if you wish can you please select from or edit this section to provide more insight in response to the question?

Poland

UK: Reps had taken up specific issues – not necessarily under the guise of age management or specifically related to older workers as a separate group, but (for example) in areas of health and safety or to defend individuals under disciplinary proceedings. The main area where unions have been engaged in *collective* discussions specifically over active ageing issues seems to be in the matter of pensions and retirement. Here, the issues tend to be complex, require high level involvement of national negotiators and are generally only likely to lead in long term solutions. Reps in the NHS were aware of the establishment of a Working Longer Review Group as part of negotiations around pension ages and were closely identified with the union’s position of challenging the raising of pension ages for ambulance paramedics, but there was no mention of these national level discussions having resulted in local level consultation around active ageing issues.

*Comments and quotations:*

Spain

Italy: We really need to try to get a better and more complete picture here. There are surely things that can be said about the limited contributions that the unions have made. Can you please see what you can do to extract material from your country level report and your article to illustrate this section?

Poland

UK: In the UK workshops we found evidence that “the collective voice” had impacted on active ageing issues through alternative means, of which collective bargaining was one. Influence through collective bargaining was noticed in relation to pensions and retirement matters, entitlement to specific benefits, training, service related benefits and so on. The issue of active ageing *as a separate issue* did not often appear on the agenda for most of the union or company representatives, though examples may be quoted where this had happened. (The working longer review group in the NHS is an example.)

Several financial services organisations had embarked on employer led “ageing workforce” initiatives with the unions seeming to have made little contribution (Barclays, Aviva) though the resulting changes did not seem especially contentious. A union rep in our financial services workshop explained that his employer had in fact adopted a progressive carers’ policy, though without engagement with the union.

Rep (Finance sector): “*I would always want to make sure, we know how you’re going to roll this out with the managers. Are you going to give them time to absorb the information and give them some guidance on how you expect it to work? …Because there are myriad company policies and I think you need to signpost it. You need to say, ‘Right, this is an important change. We’re doing this for X, Y, Z reasons, and when somebody comes to you with a request under this policy this is what we want you to do.’ I think they missed out on that.*

*“I think as well they would benefit, if they’ve got us union reps in at the ground floor, then they would have got buy-in from us. When you have someone who comes to you with a problem, and you know that there’s a company policy which could help fix the issue, one of your jobs as a rep is to convince the employee to stick their head over the parapet and go and speak to their manager and say something…I think sometimes people are scared to ask for things, and it all comes back, ultimately, to job security. They don’t want to be seen to be difficult and taking up time for their manager, and I think the organisation doesn’t mind them doing that.”*

Other mechanisms through which employees appear to have exercised some collective influence on active ageing policies were:

*Employee networks:* Older workers’ reps or “champions” exist in some large organisations. In others, joint committees have sometimes been set up to consider issue around ageing. For example, the following quotations are both from public sector organisations, the first a University and the second a Civil Service Department.

Union rep (Hull Workshop): *“We’ve got about 50 per cent of our members who are on the 50 plus age bracket, so it’s something that’s high upon our agenda. We’re involved in the policy working group that looks at policies and that covers the aging workforce, so that we’ll be looking at the stuff like reasonable adjustments in the workplace as necessary and we get heavily involved in all the policies and work with managements on them. “*

HR Manager HMRC: “*I’ve got responsibility for the age consultation group in HMRC, which, being honest, has been quite dormant over the last couple of years. We’ve got a new age champion now in xxx, who is also the chief people officer. She’s really passionate around the whole age agenda. It will be good to work with her and see what she wants to bring in around age.”*

*Multi-generational working groups:* No specific examples of these but they may exist check.

*Health and safety procedures:* Age issues are sometimes dealt with by reps in their use of day to day procedures including health and safety and training facilities – e.g. in building and construction.

*Individual rights:* Age issues are sometimes dealt with by union reps using arrangements giving individuals specific rights. This may happen for example, when an individual seeks to change his or her working conditions or ask for flexible or part time working. Typically the rep will advise the member and may accompany him or her to meet with their manager. Reps in the finance sector commented that companies sometimes have good policies which demonstrate an intention to support workers in a variety of circumstances, though managers may not be aware of them. Union rep sometimes encourage members to take up issues or point out to the management that there is a policy that could help deal with the issue.

1. **Good practices to support active ageing**

8.1 Current good practices in Partner Countries

Our research team members reported on good practices to support active ageing. The presence of good practices as described in the following table is summarised country by country. (Fuller explanations follow the table.)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Type of good practice | Spain | Italy | Poland | UK |
| Phased retirement |  | Please complete |  | No examples given |
| Support in financial planning |  |  |  | common in larger companies |
| Flexible working |  | x |  | Widespread |
| Health and wellbeing promotion |  |  |  | Common in the largest companies |
| Specific measures to support one or other gender |  |  |  | Good examples in this area |
| Measures to support lifelong learning |  |  |  | Union Learn, an innovative example |
| Measures to support later life career development |  |  |  | Mid Life career review |
| Measures to support older people being recruited into new jobs or being transferred in the organisation |  |  |  | Barclays Bolder Apprenticeships |

8.1.1 Phased Retirement

Phased retirement schemes allow individuals to gradually reduce their working hours whilst taking an increasing proportion of their pension. Whether or not they have any impact on the numbers of people ageing actively is another matter as it is possible that phased retirement encourages stepping towards complete exodus, rather than the reverse. We asked our research partners to report on the possibilities of taking partial or phased retirement in their countries and on how the issue has been raised in social dialogue.

Spain: No comment

Italy: Trade unions responses to an ageing workforce are generally focused on working time flexibility. Part-time, smart-working, tele-work and other forms of work-life-balance are important aspects of trade unions’ perspective on active ageing

Poland

UK: In the UK, partial and phased retirement is possible, subject to certain qualifications. One may work *full time* after retirement providing this is not for an employer who pays a retirement pension. If you work *part time* however you *can* receive a pension from the same employer. Some pension schemes make specific arrangements for phased retirement, though all must confirm to the broad rules stated above.

The Teachers’ Pension Scheme is an example of a scheme allowing for phased retirement. Teachers who reduce their working hours prior to retirement may draw part of their pension to make up for the income lost by reducing their hours of work. Such schemes are common throughout the public sector or in the private sector where schemes are based on defined contributions (money purchase) principles.

Where employers recognise trade unions, consultation over pension arrangements are common and unions frequently pursue bargaining objectives. However, pensions issues are often highly complex and social dialogue over them may be protracted over many years.

8.1.2 Support in financial planning:

Spain: No comment

Italy:

Poland

UK: About a quarter of all employers offer financial advice to their employees. One third of employers only match their employees’ pension contributions by the legal minimum of one per cent of earnings – hence many UK workers are badly prepared for retirement and can only look forward to meagre pensions. A report commissioned by the Centre for Business Research in xxx showed that 20 per cent of employees do not believe they will ever be able to afford to retire.

8.1.3 Flexible working

Spain: The following comment was made by a line manager on how his company tried to have consideration for the health and wellbeing of older workers and affords them a degree of flexibility.

Line Manager (Private Sector workshop): *“From the age of 55, we try our best for these workers. For example, we try that they don’t do night shift can affect them more. We try to make them work lighter, at the dining room, making beds and such. We try not to engage them in tasks involving the carrying of weight.”*

(Comment: Whilst the action described may amount to a reasonable attempt by an employer to make practical adaptations to an individual’s work and working environment, it seems to overlook the far wider dimensions of well-being promotion (in which the employer attempts to help and encourage workers to adopt a generally healthier lifestyle both in and out of work) and it fails to address the widely recognised issues around flexibility in working hours and approaches to work)

Italy:

Poland:

UK: From June 2014, all employees in the UK were given the “right to request” flexible working. This does not mean that everyone has the *right* to work flexibly, rather that everyone can *request* it and expect their employer to consider such requests “in a reasonable manner.” Flexible working can potentially include a wide range of working practices. Employees may, for example, request a change in working hours, working time or work location. They could propose new working patterns including job sharing, working from home, part time working, flexible working or any other formula which might make it possible or more convenient for them to balance work and other needs. Flexible working might allow an individual to be an active, caring grandparent or support someone who wishes to step gradually into retirement. The individual’s reasons for wishing to work flexibly might be well founded or relatively trivial – it makes no difference to their right for their request to be considered.

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

8.1.4 Health and wellbeing promotion

There are critical issues around the ways we live and work which affect our long term health. Some of the issues have been covered in reports of our workshops. Employers in all European companies have a statutory duty to consult over health and wellbeing issues. Hence, in all the partner countries the machinery exists for good social partnership though it may not always be used as effectively as it should be. The issues of active ageing may not be explicitly recognised in the advice given to either employers or to union reps. Greater attention to active ageing and the value of active commuting, team building through sport, constant attention to diet and exercise issues could all be part of a programme to drive forward an active ageing agenda. This is the issue par excellence which lends itself to social dialogue and social partnership. The following examples were cited by our research partners:

Spain: Our Spanish researcher provided a quote from a line manager in a public sector organisation concerning the need to analyse employee sickness absence. Little discussion appears to have occurred in the workshops around the need for such analytical occupational health studies, although it should be pointed out that such approaches are widely recognised as “best practice” among OH professionals.

Italy:

Poland: Employer or employee (check which) (PL\_WSP\_4): *“My company operates in the aviation production sector. Some time ago there were the so called sheltered jobs, for employees who suffered from ill health. During their recuperation period they could perform less demanding work and then return to their previous positions. However, at some point this was no longer possible, not only in my company, but (from what I hear) in other companies too. Employers focus on their basic activities and everything that is auxiliary (especially in manufacturing) or is less strenuous, is outsourced. So if employees deteriorate in health and are no longer able to work efficiently in their position, these sheltered jobs no longer exist as they are serviced by other companies. This is a very big problem.”*

(Again this misses the point about wellbeing promotion being something which goes beyond workplace health and safety and ergonomic assessments)

UK: Many companies adopt health and well-being promotional activities - most commonly the larger companies where better resources and on site facilities can support campaigns and awareness raising activities of various kinds. There are many examples of good health and wellbeing initiatives and projects to draw on including many in-company programmes.

Key issues in long term health and wellbeing initiatives include personal lifestyle issues. Union networks and training schools can provide opportunities to promote the issue of active ageing and the possibilities of driving forward using social dialogue. Union health and safety reps can play a major part in promoting health and wellbeing.

In the following quote a union rep from Barclays Bank describes a joint approach to mental health training in Barclays:

Union Rep (Financial Services Workshop): *“We’ve had a half day training through Barclays of mental health training. There’s a team leader on each floor doing a two-day course and then all the other team leaders did a half day course, but that wasn’t through Unite. That was through Barclays.* …*Then they’re bringing in something new, so each week you have ten or fifteen minutes where they get you to do something for your wellbeing. The idea is to take your mind off your role…. So, they are doing a lot around wellbeing and mental health at the moment. I think they’ve realised that mental health is an issue. They are picking up on it, and they’re trying to say what they can do to improve it going forward.”*

The following examples illustrate health and wellbeing promotional projects of different kinds, some of which have produced tools and other materials to support employer based campaigns

* New Dynamics in Ageing [Working Late project](http://www.workinglate.org/) (this specifically identifies a number of interventions to improve health and work ability.)
* Manchester Institute for Combined Research on Ageing ([MICRA) has been running a research project](https://www.micra.manchester.ac.uk/connect/news/headline-677212-en.htm) aimed at [heavy goods vehicle (HGV) drivers](https://www.micra.manchester.ac.uk/connect/news/headline-677212-en.htm) with active collaboration from the trades unions and the International Transport Federation.
* [ACAS](http://www.acas.org.uk/index.aspx?articleid=1411&q=Health+and+wellbeing+) – the Government’s independent advisory service – provides extensive information on health and wellbeing at work.
* The [TUC](https://www.tuc.org.uk/research-analysis/health-and-safety/wellbeing) provides up to date advice and support materials on health and wellbeing for union reps.
* The Human Resources Professional body, the [CIPD](https://www.cipd.co.uk/knowledge/culture/well-being/health-well-being-work) is another excellent source of advice and information on all of these issues.

Add the above to resources section or what can help section

8.1.5 Measures to support one or other gender

Spain: No comment

Italy: No comment

Poland: No comment

UK:Unions including the public services union UNISON have produced guides for reps and health and safety reps, e.g. Unison and the Royal College of Nursing have both produced guides and campaign materials. The opportunities to promote an active ageing agenda through the adoption of specific, gender oriented issue campaigns would seem to be considerable. Union reps are already doing this through health and safety reps and equality reps and committees. In all these areas the work of unions tends to be recognised and valued by employers providing reps are well equipped with facts and information. Policies have been adopted by several employers, e.g. the [University of Leicester](https://www2.le.ac.uk/offices/hr/docs/policies/menopause-policy-guidance), the Faculty of Occupational Medicine has produced a guide on the [Menopause and the Workplace](http://www.fom.ac.uk/wp-content/uploads/Guidance-on-menopause-and-the-workplace-v6.pdf). The TUC has published a guide, [Supporting Women through the Menopause](https://www.tuc.org.uk/research-analysis/reports/supporting-women-through-menopause). These are just some examples of union activities which have been directed towards the adoption of good policies to protect the health of women workers.

8.1.6 Measures to support lifelong learning:

Clearly, maintaining one’s employability is crucial to active ageing. Employers and union reps can work collaboratively. Unions have done much good work over decades to promote learning among their members and to strive for collaborative approaches with employers. The following are examples of initiatives in our partner countries;

Spain: No comment

Italy: No comment

Poland No comment

UK: There is acute awareness among UK employers that the country has a “skills problem”. Fundamentally, the country’s vocational training system is weak. Changing jobs and careers throughout life requires the constant acquisition of new knowledge and skills. Too few employers invest in training their own workers and too few workers invest in upgrading their skills and qualifications through their working lives by their own initiatives. Observers believe that the UK economy will struggle after Brexit unless we are able to train many more people to fill the high skill jobs that will be available for workers.

A key initiative was taken in the late nineteen nineties by the Labour government’s establishment of the Union Learning Fund (ULF) in 1998. This has provided a means of public investment into the trade unions which have in turn been a major contributor and catalyst to lifelong and work related learning among union members and the wider work community. [The TUC has a central core organisation called Unionlearn.](https://www.unionlearn.org.uk/publications/union-learning-fund-2018-learning-survey) This disburses ULF funds to the unions and organises campaigns and prepares materials.

A regional structure of UnionLearn parallels the TUC’s regional structure with UnionLearn staff co-located in the same offices. Paid officials, “Learning Organisers” have been appointed in many of the unions and in most unions, workplace reps with special responsibilities for promoting learning among their members are elected and trained.

In 2018 an [independent report](https://www.unionlearn.org.uk/sites/default/files/publication/Union%20Learning%20Fund%202018%20Learning%20Survey.pdf) summarised the results of the fund’s work in waves 17 and 18 of the ULF funding. The following figures are provided into the learning generated as a direct result of the work of UnionLearn and union learning reps in workplaces up and down the country: 18,170 training opportunities for union learning representatives, 5,260 opportunities for people to improve their English, maths and functional skills, 50,160 opportunities for people to gain ICT skills at a variety of levels, 45,190 opportunities for people to gain vocational qualifications at Level 2-4, 64,060 Continuing Professional Development (CPD) opportunities, 37,360 opportunities for people to progress to Further Education, 5,850 opportunities for people to progress to Higher Education, 2,070 traineeship opportunities, 32,440 apprenticeship opportunities.

The following is a short extract from the report:

*“The most common principal motivation for respondents’ participation in union learning was to perform better in their current job or to advance their career, gain promotion or a pay rise (37% of learners). Other common motivations were to support people in their community or workplace (22%) or to gain skills that would be useful in their everyday life (30%).”*

UnionLearn’s website contains an impressive [resource library](https://www.unionlearn.org.uk/resources) of case studies, tools, publications and other materials and information to support Learning Reps in their work.

8.1.7 Measures to support later life career development

The lack of career guidance for older people is one of the foremost problems encountered by older workers in trying to find work. The need for guidance may be experienced when an older worker has lost his or her job or when transferring from an existing job to a new one. In all these circumstances, the lack of suitable career guidance can be a severe handicap. Career services tend to be oriented towards the young. Older people may wish to switch into a new career, or may have found their jobs unsatisfying and feel that they need a change to restore meaning and interest to it. There can be many different underlying factors. What measures were we able to identify, either in existence or as proposals, which the social partners might take up in social dialogue around active ageing? The following are some examples:

Spain

Italy:

Poland

UK: Over the last two years, nearly 3,000 people aged 45-64 have benefitted from a Government-supported pilot of the midlife career review run by NIACE /the Learning and Work Institute. Reviews were delivered by 17 partners including the National Careers Service Prime Contractors, voluntary organisations, learning providers, TUC Union Learn, Workplace Learning Advocates and Community Learning Champions. The reviews covered employment, training, financial planning and health issues, particularly focussed on people out of work, facing redundancy, or wanting to adapt to a new way of working.

More than 8 in 10 people felt their self-confidence and belief in their skills and experience were boosted, along with other positive outcomes. One third of those receiving a midlife review took action as a direct result. One in five found work after being unemployed, one in three felt motivated to find work, change career, or take up learning and almost half reported that they knew more about possible work or career opportunities as a result (figures provided by Learning and Work Institute). (For more information [see the report on the pilot project outcomes](http://www.learningandwork.org.uk.gridhosted.co.uk/wp-content/uploads/2017/01/MLCR-Final-Report.pdf).) Workplace union learning representatives were trained by Union Learn to administer the midlife career reviews. Materials were produced to support reps ([examples available here](https://www.unionlearn.org.uk/publications/valuing-skills-older-workers-how-do-mid-life-development-review)) to encourage them to share and identify skills and hidden areas of knowledge - helpful in setting out on a new career. Union Learn has published an [evaluation report](https://www.unionlearn.org.uk/publications/mid-life-career-reviews-helping-older-workers-plan-their-future-evaluation-report) on its section of the pilot.

8.1.8 Measures to support older people being recruited into new jobs or transferred in the organisation

Older workers generally find re-entry to the labour market difficult because they are not very likely to benefit from the same systems of gentle introduction and learning on the job which can be offered to younger workers. In contrast, an older worker tends to be expected to “hit the ground running.” Work experience programmes, job trials, mentoring schemes and forms of on the job training are among the kinds of support that may be encountered. We describe below some of the specific forms of support encountered in our workshops.

Spain

Italy:

Poland

UK: There has been publicity in the UK for a new kind of apprenticeship offered to older entrants in Barclays Bank, to support older people back into the workforce. The “Bolder Apprenticeship programme” (principally aimed at the older worker) and the “Welcome Back programme” to encourage individuals who have left the workforce to return. The Bolder Apprenticeships were launched in September 2015 as Barclays became the first UK company to extend its apprenticeship programme to over-24 year old people. Barclays say that age or social circumstance should not be deciding factors in selecting candidates to be admitted onto these training programmes. The Barclays Welcome Back programme helps senior-level women who’ve taken a multi-year career break return to work. The 12-week programme helps open doors, create networks and supports individuals as they rediscover their place within work. There are a number of companies which follow good practices in this way and examples are shared and recycled through the Business in Community Age Programme.

1. **What can help?**

9.1 Types of support favoured by workshop participants

In the workshops, all research partners discussed with participants what tools and other forms of support could help them in future social dialogue. All our research partners received practical suggestions on the kinds of measures and forms of support which would be likely to support social partners in dialogue around active ageing. The table below summarises specific varieties of support in which participants expressed interest;

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Type of good support | Spain | Italy | Poland | UK |
| Manual of good practice | X |  |  | X |
| Tool to help develop the business case | X | X |  | X |
| Practical tools of any other kind – e.g. age audit. | X | X |  | X |
| Training package / course | X |  |  | X |
| Community / Network of practitioners | X |  |  | X |

Comments and quotations on the sorts of support needed to progress a social partnership approach to active ageing

Spain: Commenting on the suggestion of a manual of good practice, a Human Resources manager opined: Human Resources Manager (Public Sector workshop): *“The best thing is something that other people have done and that works. That is the best example, because it has been implemented, it has been applied, it works. Well, if someone else has done it and it works, we can do it.”*

A trade union representative (Public Sector workshop) observed: *“If the company was aware of the situation that is going through in terms of the ageing process, (…) and could facilitate and train workers so that their job posts were adapted according to their age, surely it could save a lot of money.”*

Our Spanish research partner reported strong interest in practical tips, including advice “of a psychological nature,” orientated towards the motivation of older workers and encouragement to remain in the workplace as opposed to retiring fully.

Union Rep (Private Sector workshop): *“the motivation should be studied better. How might an older worker be motivated? Let’s think of a worker who is willing to leave, how to motivate him to stay and transmit his accumulated experience after all those many years working?”*

In response to the suggestion of a training course or package, a union rep had commented (Public Sector workshop): *“We’d like to gain knowledge of policies and practices on active aging.”*

The Spanish workshops and interviews produced the following further suggestions on the content of the training module which the ASPIRE project aims to produce. It should contain:

• An explanation of the idea of active ageing and its connection with production environments.

• A presentation of the most relevant regulations and public policies in each specific environment that can be useful as references and also as tools for introducing the culture of active ageing in the workplace.

• Practical tips about personal care —physical, psychological, economic and social—for people growing older.

• Reflections on and specific examples for increasing awareness about the importance of paying attention to the ageing of a company's workforce.

• Ideas for bringing the issue of active ageing to the negotiating table, alluding to how other companies have done it.

• Practical strategies for tackling intergenerational conflicts and promoting solidarity among different generations of workers.

• Specific measures against age discrimination.

• Description of successful cases, at the national and international levels, of active ageing cases that may be inspiring.

• Specific mention of the topic of motivation and active ageing in the table of contents.

• Information about how actions that promote active ageing are being financed in other regions and countries.

Italy:

Our Italian partners offered the following observations in relation to tools and support

Manual of good practice - Employer’s representative (Rome workshop 1): *It should be very useful to have access to collective agreements that contain active ageing measures in order to understand how they were implemented in practice.*

Tool to help develop the business case - There was some support for this idea.

Trade union representative, (Rome workshop 1): *“Creating a toolkit with case studies of good practices in the field of active ageing can be useful but it should include specifics measures that could be taken as an example by the companies, including small and medium ones”*

Poland

UK: Both employers and trade union reps supported the idea of tools and good practice guides to assist the adoption of active ageing policies and practices. Views of the kinds of support that would be most appreciated embraced all of the suggested forms in the previous table.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 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 |

Appendix 5

Coding Structure for Thematic Analysis

The following is the draft coding structure agreed between the partners for use in the thematic analysis of workshops and interviews. In practice, not all of the nodes and sub-nodes were used and there was variation in the extent to which each node/sub-node was deemed to be relevant in each country. In a few instances, third level nodes were created to embrace unanticipated focuses of discourse. (These are not shown in the basic coding structure below)

1. Barriers and facilitators to active ageing
   1. Barriers-
      1. Industrial relations systems- Ways in which institutional system (e.g. collective bargaining, works councils etc) impact on dialogue on active ageing.
      2. Macro-economic issues (eg unemployment, economic restructuring)
      3. Legal or social policy issues (impact of employment laws, pension ages, etc)
      4. Sectoral issues (skills or labour demands)
      5. Organisational issues (HR policies, workforce management)
         1. HR policies
         2. Ergonomics
         3. Workforce management
      6. Union issues (union policies, campaigns)
      7. Individual issues (retirement plans of staff, health issues, expectations)
         1. Health
         2. Finance
         3. Family/caring
         4. Retirement plans
   2. Facilitators
      1. Industrial relations systems
      2. Macro-economic issues (eg unemployment, economic restructuring)
      3. Legal or social policy issues (impact of employment laws, pension ages, etc)
      4. Sectoral issues (skills or labour demands)
      5. Organisational issues (HR policies, workforce management)
         1. HR policies
         2. Ergonomics
         3. Workforce management
      6. Union issues (union policies, campaigns)
      7. Individual issues (retirement plans of staff, health issues, expectations)
         1. Health
         2. Finance
         3. Family/caring
         4. Retirement plans
2. Perceptions of active ageing
   1. Definitions of active ageing
      1. Level of understanding
      2. Perceptions of work as part of active ageing
   2. Organisational perceptions
      1. Corporate policies
      2. Line manager perceptions
      3. Workers’ perceptions
   3. Union perceptions
      1. Union movement policies and campaigns
      2. National union policies
      3. Perceptions of union reps
   4. Regional body perceptions
      1. Labour issues
      2. Impact on local economy
3. Responses to active ageing
   1. Company responses
   2. Union responses
   3. Social dialogue approaches (ie coordination between two)
   4. Regional coordination
   5. Sectoral approaches to active ageing
4. Intergenerational issues
   1. Concerns over intergenerational conflict
   2. Perceptions of younger workers
   3. Intergenerational work teams
   4. Mentoring
   5. Intergenerational support
5. Good practice in active ageing
   1. Collective bargaining
   2. Healthy workplace initiatives
   3. Recruitment/joblessness
   4. Flexible working
   5. Training/lifelong learning
   6. Performance management

1. Under the European Commission DG Social Affairs and Inclusion funding call, “Improving Industrial Relations,” (VP/2016/004) [↑](#footnote-ref-1)
2. Quílez, 2014, p. 221 Spanish desk report, (p. 24) [↑](#footnote-ref-2)