

Active Ageing
through Social Partnership
and Industrial Relations in Europe
Workshop findings

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

Summary of Empirical Evidence

1. Introduction

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). This report is a short summary of the empirical evidence and research undertaken by the project. (All of the desk-based research is brought together in [a composite report and a series of country reports available on the ASPIRE website](#)). The purpose of this report is to give a broad overview of the empirical research findings of the project for the busy reader who may be less interested in the full details of comments and discussions in the workshops and interviews held as part of the evidence gathering exercise. [For a more in-depth account please see the full report of the evidence here](#). The practitioner reader, whether HR manager, union officer or training professional, will also be interested in the practical outputs of the ASPIRE project. These will include examples of good practice, a training module and a collection of video interviews. The purpose of these is to support and hopefully stimulate social partners into discussions of various kinds ('social dialogue') around Active Ageing. Recognising that this report represents a readily accessible output of the ASPIRE project, we include in the first part, an explanation of the background to the project and its policy context.

2. Aims of the ASPIRE project

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 2016¹. 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

¹ Under the European Commission DG Social Affairs and Inclusion funding call, "Improving Industrial Relations," (VP/2016/004)

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.”](#) 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.

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.

3. Orientation of the project

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 above summarises these practical, action-oriented aspects of the project.

4. Other European Research into active ageing

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.

5. The Research Dimension of ASPIRE

Box 2:

Specific Objectives / Research Questions of the Aspire Project

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?

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 above.

6. 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:

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 Table 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 and organised both sectors and regions. Where possible, unions and employers

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participated in workshops together, but some were organised separately. In total, twenty-six workshops were organised in the four countries. Table 1 summarises the workshops which were conducted. The English version of the workshop discussion protocol is included in Appendix 1.

All of the transcribed material has been stored and is available in UK Data Archives.



Table 1: Workshops conducted

Country	Social partners	Industry	Participants
Italy	Unions and employers	Agriculture	Confagricoltura, CGIL
Italy	Unions and employers	Public sector	FIPE, CISL
Italy	Unions and employers	Steel	Steel firm
Italy	Unions and employers	Chemicals	Assosistema and FEMCA CISL
Italy	Unions and employers	Mixed	Conf-cooperative and FIRST-CISL
Poland	Employers	Mixed	FOB
Poland	Unions and employers	Mixed	Lodz SP
Poland	Unions and employers	Mixed	Pracodawcy
Poland	Unions	Mixed	Warszawa
Poland	Unions and employers	Mixed	Falenty SP
Poland	Union and employers	Mixed	Olsytn region SP
Poland	Unions and employers	Mixed	Falenty SP
Spain	Union and employers	Manufacturing	Andalusian SP
Spain	Union and employers	Education	Andalusian SP
Spain	Union and employers	Leisure, sports and tourism	Andalusian SP
Spain	Union and employers	Social health and education services	Andalusian SP
UK	Union and employers	Higher education	University of Hull and UCU
UK	Union and employers	Public sector	HMRC, PCS and FDA
UK	Employers	Construction	IOSH
UK	Employers	Health and social care services	Humber Paramedic Services
UK	Employers	Mixed	CIPD, North East LEP
UK	Employers	Mixed	Humber LEP
UK	Employers	Mixed	City of London
UK	Unions	Construction	UNITE
UK	Unions	Finance	UNITE
UK	Unions and employers	Health, social care and voluntary services	UNITE

Interviews with key stakeholders

A series of interviews were undertaken by each partner. These were audio recorded and in some 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.) The purpose of the individual interviews was to complement workshop discussions. Whereas the workshops provided workplace level perspectives on how social partners were discussing workforce ageing issues. The stakeholder interviews were aimed at generating data on national perspectives and policies on Active Ageing, social dialogue and intergenerational solidarity. Interviews were conducted first with our social partner collaborators followed by organisation which have an interest in ageing workforce issues in our respective countries. The English version of the interview guide is included in Appendix 2. Table 2 summarises the interviews which were conducted.

Table 2: National stakeholder interviews

Country	Social partners	Organisation
Italy	Union	Steel union
Italy	Union	Collective bargaining unit Lombardy region
Italy	Employer	Employer association Modern Retail sector
Italy	Employer	Employer association agricultural sector
Poland	Union	Trade union representative Solidarnosc (Volkswagen Poznan)
Poland	Union	Trade union representative Solidarnosc (University of Lodz)
Poland	Employer	Klub 500
Poland	Employer	Lodzka Izba Przemyslowo-Handlowa
Spain	Employer	Local Women Employer association, Chairman
Spain	Union	Trade union representative, leisure-sports-tourism sector
Spain	Union	Trade union representative, manufacturing sector
Spain	Employer	Social health and education services sector, Area Director
UK	Union	TUC, Equalities Officer
UK	Employer	ENEI, Engagement Officer
UK	Union	UnionLearn, Union National Officer
UK	Employer	EEF Manufacturing Employer, National Officer
UK	Employer	Occupational Health Officer, Large employer
UK	Government	ACAS, Senior Adviser

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.

Qualitative research methodology

In order to gain an understanding of whether and how social partners were discussing workplace Active Ageing and intergenerational solidarity, qualitative methods (interviews and workshop discussions) were used. The purpose of qualitative methods is to generate thick descriptions (Burns, 2010) of the industrial relation policies within workplaces and industries as well as the processes which had brought them about. Qualitative methods are appropriate for inductive reasoning and theory building (Flick, 2009), and in this case, they were used to better understand how the dynamics of social dialogue were leading to different outcomes on the topic. Further, workshop based discussions were used in order to generate discussions within and between social partners on the topic of Active Ageing which in many instances was a novel term. Accordingly, the group discussions facilitated a collective sense-making (Wilkinson, 1998) in which participants could explore the benefits of, barriers to and practicalities of new approaches to managing workplace ageing.

Thematic analysis

Thematic analysis was used in order to identify patterns of both common and divergent themes within and between workshop discussions (Braun and Clarke, 2006). Themes were initially developed using the five key questions which framed the research and then expanded upon as the data were analysed. Regular discussions between the country level research teams via online discussions in order to compare and contrast emerging themes. Accordingly, coding structures were developed in a coordinated way in order to facilitate comparisons between case studies at a national, regional and sectoral level (Yin, 2002). 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 3, 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.

7. Desk Research – Summary of Findings

Box 3

Reports Summarising Desk Research Findings of ASPIRE project

[Active Ageing through Social Dialogue and Industrial Relations in Europe Summary](#)

[Active Ageing through Social Dialogue and Industrial Relations in Europe \(Consolidated Summary of Four National Reports\) – Matt Flynn](#)

[Preceding Projects Summary Report \(A summary of the evolution of European policy on active ageing and social dialogue and a quick overview of some earlier projects and the framework agreement on active aging\) – Chris Ball](#)

[National Report for Italy – Paolo Tomassetti](#)

[Summary of National Report for Italy – Paolo Tomassetti](#)

[National Report for Poland - Izabela Warwas, Justyna Wiktorowicz and Piotr Szukalski](#)

[Summary of National Report for Poland - Izabela Warwas, Justyna Wiktorowicz and Piotr Szukalski](#)

[National Report for Spain – Mariano Sánchez and Pilar Díaz](#)

[Summary of National Report for Spain - Mariano Sánchez and Pilar Díaz](#)

[National Report for the United Kingdom – Chris Ball and Matt Flynn](#)

[Summary of National Report for the United Kingdom – Chris Ball and Matt Flynn](#)

Whilst this report focuses on the empirical evidence of our study, for completeness the structure of our desk based evidence is summarised in the reports listed in box 3 above. These reports include initial findings in response to our five research questions (box 2, page 6). The remainder of this report will now attempt to capture in summary the evidence of our workshops and interviews.

8. Empirical research – findings across the partner countries

Each participating country 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. 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.

9. Awareness and Perceptions of Active Ageing

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. Workshop participants were aware of various incentives provided by the welfare state to encourage older workers to delay retirement. However, take-up of such opportunities was low and consequently, there were few reported active conversations on the topic. The topic of ageing workforces was known to participants, but in a negative light. Unions saw the extension of working life as an erosion of the right to retire, while employers worried about having to retain older staff with outdated skills. When explained by the facilitators about the concept of Active Ageing and the ways in which older workers can be supported in work in order to stay productive and engaged, participants were generally supportive of the idea. Participants emphasised that the low level of awareness of Active Ageing was therefore suppressing dialogue on the subject since neither employers nor unions could see the benefits.

Italy

Our Italian partner reported that many of those attending the Italian workshops seemed enthusiastic about the idea of active ageing while others were less confident and 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 (we are told) is in line with the traditional Italian logic of collective action, in which trade unions and employers’ associations’ strategies are shaped 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 to the top of their agendas. Our Italian 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. Statements from individuals attending the Polish workshops often contrasted these two sides of the coin. Whilst some individuals adopted the conventional, ‘received wisdom’ position, recognising the inevitability that living longer must entail acceptance of a longer working life, employers tended to believe that there was little that employers could do to influence the decisions people took around retirement.

United Kingdom

Participants in the UK workshops seemed broadly familiar with the main legislative changes on age discrimination and the end of mandatory retirement. There was little challenge to the idea that *active ageing* is a self-evident ‘good’. Specifically, participants saw the issue as one of removing unnecessary barriers to work faced by older workers. Union representatives emphasised the importance of protecting workers from discrimination while employers focused on making better use of skills and knowledge across the life course. In both cases, social partners discussed the issue in terms of striking a fair balance of the interests of first older and younger workers and second workers and employers. 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 what constitutes old age had changed somewhat over recent decades and 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, though a theme running through a number of the interviews and workshops was that employer adaptations to the ageing workforce had largely centred upon complying with new legislation against age discrimination without addressing the issue of active ageing. That said, 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 for example, 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, though this had been done over the heads of the union reps and in their view had been somewhat less well implemented as a result.

10. Perceptions of active ageing as a long term issue

There was little or no awareness of the Framework Agreement on active ageing among the partners at of our workshops in three of our country based case studies. The exception was Poland in which the trade union federation Solidarnosc organised a two-day workshop to disseminate the agreement to unions which were then tasked to develop sector based approaches to embedding active ageing at the workplace level. Spanish social partners noted that at the time of the workshops, the Framework Agreement had not yet been translated into Spanish. UK social partners were not aware of the Framework Agreement but were generally aware of government policies and initiatives promoting active ageing HRM policies such as the priority area within the Industrial Strategy (BEIS, 2017).

Active ageing was by common agreement in all countries a long term issue. Opinion was divided as to whether the goal of active ageing was best achieved by Government policies or action at some other level. In Italy, comments from both employer and union participants suggested that solidarity pacts and sector wide agreements might provide the route to progress. An insightful comment from an Italian union rep emphasised the broader discourse and role of lifelong learning in progressing active ageing. Union respondents in Italy also argued that active ageing could be pursued as a ‘sustainability’ bargaining issue. Investment in measures to support older workers in delaying retirement could produce some benefits to both employers and workers, but neither would see an immediate return on that investment.

The Polish participants tended to see the issue as being advanced more through national level policy changes supported by employers and the state, with incentives in the form of tax breaks for employers to “do the right thing,” and a strong lead being given by national, provincial and municipal level Councils of Social Dialogue. In contrast, UK representatives saw change being brought about mainly through agreements with employers at company level or within regions in order to tackle problems like skills shortages amongst small firms. Labour market inactivity of individual workers was understood to be brought on by a progressive onset of diseases contracted through harmful working conditions with multiple employers earlier in an individual’s working life. Nonetheless, even though this “life course” explanation was seen as a factor in individual workers’ early exits, neither union reps nor managers proceeded to argue for industry or sector wide agreements to improve working conditions, even though these might be thought a logical corollary.

11. Early retirement cultures

Worker attitudes favouring early retirement seemed widespread in Spain, Italy and Poland, but much less so in the UK. Such attitudes could be linked to frames of reference and cultures in which early retirement was seen as normal, acceptable, perhaps even desirable. This state of affairs seemed widespread in Spain, Italy and Poland, but much less so in the UK. In Spain and Italy retirement was seen as a solution to certain sets of problems, with management using it to dispose of workers who might resist change or be difficult to incorporate into a new working arrangement. A Spanish union rep frankly admitted that people were “dying to be 65 or even 60 and leave the company.” An Italian union rep said that companies would use early retirement as a convenient way to promote the departure of ‘uneconomic’ workers but took little heed of the consequences in terms of workforce sustainability.

Our Polish research partner commented on the strong presence of an early retirement culture, though on closer scrutiny it appears that Polish workers commonly retire and then re-enter the workforce in the same or similar roles, on favourable contractual terms, taking their pensions early and benefiting financially. Recent Polish Government decisions had caused some confusion concerning retirement expectations and might conceivably have contributed to some kind of cultural reappraisal regarding early retirement. 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. The Polish state pension agency ZUS has estimated that 331,000 people could take advantage of the option to retire earlier. With the insight that widespread “deretirement” is now operating in Poland, the Polish context must be seen as something of an oddity. Our workshops produced evidence that the Polish social partners are in general, pragmatic over the issue of retirement age. Our researcher commented 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.*”

In the UK it seems that a once commonplace early retirement culture, has been much dampened down, in part through a blend of legal reforms, the financial condition of pensioners and the possibility of working flexibly in part time and less demanding roles. A union rep commented in one example, that work provided a social context which benefited certain workers, depending on their particular family circumstances. Although early retirement was seen as less embedded in the UK workplace culture than the other three countries, there was a significant concern about older workers being pushed out of work early through ill-health, precarious work, and lack of support from their employers. Older workers who are employed on a fixed-term or casual basis (for example, agency workers in the construction sector) were seen to be at risk of forced early retirement without a safety net.

Union representatives in particular thought that the hardship faced by workers in these circumstances are often overlooked in discussions of extended working life.

12. The industrial relations systems and active ageing discourse

In this section we assess the contribution made by the framework of industrial relations to the form of social dialogue, in particular, dialogue on active ageing.

Spain

In Spain, there is a well-developed structure of collective bargaining at industrial sector and regional levels, but low levels of union membership and poor union organisation at company or plant level. Because of this there seemed little scope for social dialogue about active ageing covering the large number of small and medium sized enterprises. The scope for bargaining was typically small and relationships between employers and union reps seem to leave little opportunity to engage in the detailed and specific dialogue over changes in working methods and conditions to address workforce challenges like ageing demographics.

Italy

Similarly, in Italy, despite the emergence of bilateral funds (as an innovative aspect of the industrial relations system) and historically strongly organised campaigning unions at national and regional level, union organisation at company level is often weak. Unlike Spain, there are weak structures for disseminating industrial policies top-down. Employers have discretion in ignoring parts or entire collective agreements and could therefore consider a framework on active ageing as merely advisory. However, there is more robust horizontal coordination meaning organisations tend to exchange good practice with one another. Smaller companies are difficult to organise and human resource management approaches are used to tightly control both the agenda and scope for collective influence.

Poland

In Poland, there are ready made structures which do indeed lend themselves to social discourse (at national, regional and municipal levels) over active ageing policies and there was some evidence that at least one of the trade union confederations had seized the initiative by calling meetings of employers and union representatives to brief them on the issues and possibilities arising from the framework agreement. In the larger enterprises (factories) at least, active union / employer social dialogue appears to be taking place, suggesting that these Polish workplaces might provide fertile ground for more detailed agreements and partnerships around active ageing to be grown and nurtured. On the other hand, it seems clear that the agenda is currently dominated by issues of pensions and retirement, so activities would probably need to be built around these concerns.

UK

In the UK, the depth of union organisation varies considerably. In some sectors, including the public sector and parts of the private sector, there are well established structures which could be used to develop effective social dialogue around active ageing. Larger organisations recognising unions in both the public and private sectors, seem well placed to initiate discussion of active ageing issues and there are a number of innovative examples to draw on, particularly the National Health Service. Health and safety consultation arrangements are even more widespread than formal collective bargaining arrangements and would seem to be a potentially useful route to use to trigger and foster social dialogue around active ageing. In contrast, the lack of sector level and regional bargaining in most sectors would limit the possibility for multi-employer agreements. An optimistic scenario might suggest that there may be scope for dialogue supporting measures to be introduced - possibly through Local Enterprise Partnerships (LEPs) and local trade union organisations, for example TUC and UnionLearn structures. Social dialogue has been occurring in some LEPs between employers, regional TUC branches and NGO's to tackle local labour market issues which could not easily be addressed through traditional collective bargaining, for example economic inactivity of people in their fifties or skills shortages in SMEs. However, in most sectors, such ready made arrangements do not presently exist and there are large areas of the private sector where unions do not even have company level agreements.

Despite these limitations, in each country it is possible to cite examples of productive social dialogue taking place. In Spain, a union rep complained that social dialogue was focused on too narrow a range of issues, though social dialogue does occur around productivity matters (such as where training is needed for adaptation of a new technology). Comments on the scope for social dialogue around active ageing were fairly pessimistic but developing discourse outwards from productivity questions may provide a means to encourage such discourse. In Italy, a union representative observed that the unions had a key role in encouraging managements to make creative use of the bilateral funds, which are a particularly innovative aspect of the Italian system of industrial relations. In Poland, a representative commented positively on the potential of a parity committee, while in the UK, company level bargaining ranged very widely from union participation in joint problem solving including members grievances, to a broad range of equalities issues and in some sectors a high degree of collaboration particularly in relation to health and safety matters.

13. Extent of present social dialogue on active ageing

There were few reports of social dialogue taking place in the partner countries specifically on active ageing as a formal agenda item or as part of a programme of work initiated around the active ageing theme. More positively however, social partners in all countries manifested shared concerns, which though not labelled as being around "active ageing" as such, may yet mark an incipient social dialogue process and equally awareness of the need for workers to be able to age both healthily and actively.

In Spain and Italy, although there was some recognition among the unions that active ageing was important. Ideas were offered during our workshops, relating to training and the establishment of regular discussions between employers and unions on good practices. Practical dialogue on the *active ageing* theme as such, was however minimal. In Poland, our research partner commented that there was a need to strengthen the institutions of social dialogue to embrace training and better communication. An employer spoke strongly in favour of greater transparency of communication and for the subject matter of discussion to be relevant to participants. In the UK, union representatives reported on difficulties they had in discussing issues relating to working and ageing, specifically around changes to job roles and working conditions to support working longer. That said, examples *were* cited of unions being involved, either in individual issues (such as capability related dismissals) or more broadly on initiatives directly addressing the active ageing agenda. In summary, despite factors in the industrial relations structures of each of the countries tending to inhibit discussion on active ageing matters, a more optimistic scenario can be described in which discussions are taking place in response to specific pressures faced within labour markets in organisations, regions or sectors.

Looking specifically for evidence of innovative approaches to social dialogue, our Spanish researchers reported that the social partners had little time and resources to devote to such matters. Where active ageing was discussed, it was usually within the context of age inclusivity within the community rather than specifically in a workplace context. In Italy, sector or industry level bodies had played an important part in developing social dialogue and the state had been an important facilitator via tripartite meetings and consensus building. Employers had taken steps to remodel their structures of dialogue, through mergers of some sector bodies and efforts had been made to close market cleavages, for example between younger and older workers, insiders and outsiders. Our Polish partner described a conference organised by the union Solidarnosc specifically to provide a briefing on the Framework Agreement on Active Ageing, which was one of the rare forms of explicit recognition of the issue as part of a wider agenda. In the UK, there were a number of innovative approaches, which while not directly being presented under the brand of active ageing, seemed well suited to addressing some of the challenges which active ageing can be seen to present – around workforce learning and career change, for example.

14. Role of Government

In this section, we draw on interviews and comments from our researchers to briefly summarise the roles of the country's governments in fostering both social dialogue and active ageing policies. Key elements in the development of active ageing social dialogue are explained briefly below together with short comments on future prospects.

Spain

Our research partner reports that the Spanish Government has done little to promote social dialogue over the years, though there are now hopeful signs emerging since July 2018. Sectoral protocols and collective agreements are very important and set the pace in determination of working conditions. Some new provisions incentivise workers to delay retirement, although early retirement pathways are still open and are more popular. Over a period from December 2017 to July 2018 (when our field work ended) the Spanish Socialist Party, now in Government, has taken initiatives which may transform prospects for more productive social partnership dialogue in a general sense. Sector agreements are likely to remain key however and much is likely to be driven by the initiatives of the social partners and their willingness to embrace the active ageing agenda.

Italy

In Italy a series of tri-partite framework agreements concluded from 2009 onwards appears to have created frameworks for social dialogue on workplace ageing with pacts driving towards voluntary, comprehensive multi-employer bargaining, the taxation system being used to foster local bargaining and a concerted drive to use decentralised bargaining to foster increased productivity. Other measures have encouraged departure from the dominance of sector level bargaining to more local agreements and a more local approach to social dialogue. A statute enacted in 2011 provides additional emphasis on devolved bargaining away from centralised sector bargaining machinery. This new emphasis on decentralised collective bargaining has breathed new life into plant level bargaining, with particular reference to productivity issues - among the principal concerns of employers. At the same time, the unique concept of bilateral funds has provided an injection of collaboration and co-operation which could well transform Italian industrial relations – and may have already gone some way towards doing so. The idea of a jointly managed fund to collect and disseminate resources to support social welfare activities has caught on, supporting a new spirit of bipartisanship in areas such as the provision of health benefits, pensions and learning. It may only be a short step to take this concept into other areas which if joined up, may become part of a holistic age management strategy.

Poland

Poland has introduced rapid changes in public policy in relation to the state retirement age. Whilst these have created considerable uncertainty, a large measure of informal working in retirement has arisen in response to the newly *lowered* retirement age. (Whilst this may actually boost working longer, it is not clear that it will be a permanent policy position for this or a future government to adhere to.)

The Polish industrial relations system would seem to require some additional energy to more fully realise the readiness of people to continue working (albeit, informally) in later life

as one of a number of elements in active ageing. More positively, a structure of social dialogue aimed at supporting social and economic development has now been put in place, including creation of a new central body, the Social Dialogue Council (RDS), 'aimed at facilitating conditions for socio-economic development and increasing competitiveness and social cohesion'. Hence, statutory initiatives at national and provincial level could well lay the basis for productive discussions towards active ageing, though much may depend on the knowledge, skills and resources of the participants in the RDS and other forums which have been created. Bilateral social dialogue at the level of sectors is weak in Poland and at company level it is only developed in the largest of organisations.

UK

The industrial relations system is formally well used to social dialogue, though there are now large areas of the economy which are poorly represented by trade unions and collective bargaining / consultation of any kind. In larger private sector organisations and in the public sector there are opportunities to consult over a wide range of issues, but examples of direct social dialogue over active ageing are few. That said, opportunities exist under legislation which could well be built upon. 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. These regulations provide formal rights to employees outside of collective bargaining with trade unions, though there are doubts as to whether they could in practice provide a basis for equally effective social dialogue as can be achieved under conventional collective bargaining and union recognition.

UK employers are legally obliged to consult with employees over health and safety matters, redundancies and transfers of undertaking. Consultation may be either direct (with the workforce as a whole), through an elected safety rep or union representative. Focusing discussions on health, safety and *well-being*, as the law provides, could therefore offer a way in to social dialogue in workplaces where there is no formal union recognition.

In the four countries taken together therefore, there are a number of examples of social dialogue on the theme of active ageing, which may be identified. In large part, these seem to have stemmed from particular characteristics of the industrial relations system in which they have been found. Whilst there is neither an absence of interest in any of the countries, it is evident that much work needs to be done to raise awareness so that the ambitions of the social partners match those of their respective national Governments in this policy domain. Governments have a crucial role in promoting social dialogue.

In Poland, Government vacillation around the legal retirement ages of Polish workers paradoxically has created a loophole which seems, if we understand it correctly, to have given Polish workers an unintended (but ethically questionable) bonus for working longer

outside normal employment law regulation. In the UK, while workers have benefited from employment protection rights carried forward by European policy, periodic swings of enthusiasm and Government energy have helped to build a formal commitment to active ageing initiatives at least at the level of the state and larger organisations. Some good ideas and impressive practices have emerged, but outside the public sector there is an absence of sector level bargaining and social dialogue which stands in marked contrast to the position described in our other partner countries. This may have a deleterious impact, particularly as it leaves a lack of any established machinery of social dialogue in small and medium sized enterprises.

15. Views on long term nature of active ageing

Social partners in all of the countries saw active ageing as a “long term issue.” Perceptions on the future progress of social dialogue on active ageing seemed in some measure, to be shaped by the systems of industrial relations in force in each country.

Spain

In Spain, active ageing seemed to be a relatively distant issue to which the social partners had not so far turned their attention, though there was acknowledgement that it would become an issue at some future point.

Italy

The EU’s call for social activation policies, had taken the form of sector level Intergenerational Solidarity Pacts. While in the application of these pacts, a long time perspective seems to be adopted, recognition of active ageing as a *process* is acknowledged as influenced by contemporary policy measures. An Italian union representative argued that problems linked to active ageing must be addressed in a broader discourse of a new social contract that fits for all. He emphasized how important it was to understand active ageing as a life-long learning process.

Poland

The importance of public policies (nudge policies, in effect) was emphasised. Participants identified national policy changes required for *employers* and *the state* to facilitate change rather than them coming about through employers recognising their desirability from the bottom up, or through discourse with employees. In one workshop an employer representative commented that employers, “...would need to have some form of relief ..., or any support, or lowering of some employment taxes, or any additional grants so that the employer ... does not ‘get rid of’ older workers.” They would need policies, “...that offer some encouragement to employers. It would be seen as a benefit. It would also be helpful to show good examples of [actions by other employers] not only in this country, but also abroad. All of this would help to promote dialogue on active ageing and share good

practices”. The National and Provincial Social Dialogue Councils were seen as the main conduit through which such policies could be achieved, that is to say at National or Regional Government levels.

UK

Government’s role in promoting active ageing has been outlined in various policies papers and good practice guides issued by the Department for Work and Pensions (DWP, 2014, DWP, 2001, DWP, 2013) which have promoted the business case for organisations to enable older workers to extend working life. In 2017, the Department for Business, Energy and Industrial Strategy issued an Industrial Strategy for the national economy focusing on four Grand Challenges, of which “harness[ing] the power of innovation to help meet the needs of an ageing society” (BEIS, 2017). Some workshop participants saw workplace ageing as part of this priority area with bespoke approaches to ageing demographics which fit the needs of businesses within sectors or regions.

16. Understanding issues germane to active ageing

For social dialogue over active ageing to thrive and produce results, one would expect the social partners to have a degree of understanding of certain key issues. Desire for discourse might come from some understanding of demographic change, experience of challenges in seeking new staff with the skills and aptitudes needed for hard to fill jobs, familiarity with the health and well-being issues facing the workforce in a particular sector and any one of a multitude of other issues. In our research, while we did not canvass understanding so widely, we asked our researchers to assess approximately, the knowledge and understanding of the social partners in relation to a small range of issues we believed would likely be central to a substantive social dialogue over active ageing.

Pensions

Understanding of pensions issues in their respective countries varied from “high” in Italy to “little” in Poland and Spain. Whilst neither union representatives nor employers possessed detailed understanding of active ageing they seemed eager to fill knowledge gaps on pensions issues. A Spanish union representative commented:

“Many of the queries that I receive 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?’”

Italian union representatives commented on the latest pensions reforms which created a need to understand public retirement pensions better. The rapid changes in retirement law in Poland had created confusion and concerns about public policy in the field of pensions and

retirement. In the UK workshops we heard of numerous confusions over pensions issues. For example, we noted 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. Union representatives as well as employers thought that improving financial awareness could be a way in which social partners can work collaboratively on an issue of mutual interest.

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. (These assessments are recorded in the main evidence report). Comments on these findings are provided in the following sub-sections.

Age discrimination rules

Employers were assessed to low levels of understanding of age discrimination rules and regulations in all countries (Italy and Spain, “no understanding,” Poland and the UK “modest understanding.”) Union reps in Spain were assessed as having “no understanding” of the same issues while in Italy, Poland and the UK they were assessed as having “good understanding,” (“good/modest” in the UK). Comments from participants highlight the complexities of the legislation relating to age discrimination and the relatively rarity of them having been used to progress an active ageing or age positive agenda. In both the UK and Spain, mandatory retirement is abolished in most circumstances while in Italy, an employee can extend their contract of employment by delaying drawing down their pension. Social partners in the UK were aware that age could not by itself be used as a reason for dismissal. On the evidence of our workshops it would seem that familiarity with age discrimination law and its broader implications, is lacking to some degree on both sides of the negotiating table in all of the countries in the project.

Apprenticeships and training

Management understanding of rules and regulations around apprenticeships and training was assessed as “high” in Italy and Poland, “modest” in Spain and “little” in the UK. Union representatives were assessed as having “good” familiarity in all responding countries. In all countries, apprenticeships and training was recognised by employee representatives and employers as an opportunity to foster cross generational knowledge exchanges and a means through which intergenerational solidarity could be fostered. Union reps in UK in particular expressed strong dismay at the prospect that their trade skills were being diluted by inferior apprenticeship training arrangements. Participants from Spain were critical of the use of “relay contracts,” in which older workers are subsidised to step down in favour of a younger worker. The point was made that to work properly, such contracts needed to involve the older worker in a training function allow the younger worker to undergo the training, and this was

not happening. Overwhelmingly, apprenticeships were seen as for the younger worker – there was little mention of or interest in older apprenticeships in any of the workshops. The exception was in a public sector organisation in the North of England in which management was struggling to attract younger applicants to its apprenticeship programme.

Government policies on ageing workforce and retirement

Management manifested “modest” or “low” understanding of the policies of their governments in relation to the ageing workforce and retirement. Union reps were assessed as having “modest” understanding in all returns. In Spain, the policy of partial retirement had not met expectations of it as a catalyst to knowledge transfer. In Italy, the policy of extending working life was understood by union reps but there was little comment on it. In the UK the Government’s policy did not form the basis of any detailed discussion in our workshops. On this evidence at least, policy dissemination messages (such as they may be) seem to have fallen on deaf ears, as neither managements nor union reps were influenced by them. Whether, and to what degree, this fact may have inhibited social dialogue on active ageing up to the point of our workshops is not clear. That said, all researchers reported that their workshop discussions aroused considerable interest, which perhaps bears out one of the driving ideas of the ASPIRE project – to produce dissemination materials and training for the social partners to engage in future activity.

17. Early retirement cultures

A key issue in the promotion of active ageing is said to be the growth of policies and practices which encourage early retirement. In Italy, Spain and Poland our researchers observed signs that an early retirement culture remains as an influence on workers’ actions. In the UK on the other hand, the picture was described as mixed with some signs of an early retirement culture but also the contrary. A Spanish union representative commented, *“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”*. In Italy an employer in Rome commented, *“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...”* whilst in Poland, our research partner commented, *“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.”*

In contrast, 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.) On the other hand, examples were quoted of workers choosing to work much longer, bearing out the national trends observable in employment

statistics. A union representative in a Financial Services company commented, *“You’ve got the older generation who’s been there possibly 20 or 30 years, and who have come past general retirement age. They may ... come to work part time, because there are people at work. They speak to people, they see people, it’s social...they’re coming to work for their own reasons.”*

18. Positive action to promote active ageing

How far were the social partners minded to behave *proactively* in pursuit of active ageing? In Italy our research partner judged that employers demonstrated little acceptance of this need. In contrast, somewhat paradoxically given low levels of concern expressed at other points by Spanish participants, there appeared to be a high level of acceptance by Spanish employers that things had got to change. As one employer put it, *“...delaying retirement age is not enough.”* Our workshops delved into the issues more deeply. In principle, it seemed that employers in all countries wanted to “do the right thing.” There was general agreement among all our researchers/ observers that employers in their country understood the “business case” for active ageing. As to the causes of inaction by employers to support older workers to remain longer, concerns over what were perceived to be the lower levels of productivity of older workers were a common denominator across all countries. Reluctance to hold conversations about age and retirement was only seen as a “modest cause” of inaction in Poland and the UK but not in the other two countries. Employers made *some* use of early retirement to manage manpower requirements (a lot in Italy, infrequently in the UK). Technological changes had made “some impact” on employers’ support for older workers but seemingly they may have been a bigger factor in Italy.

19. Individual barriers to active ageing

A similar range of possible factors serving to inhibit discussion and furtherance of active ageing was considered. In the main, workshop participants did not perceive a reluctance by workers themselves to participate in discussions of retirement plans to be holding back progress towards active ageing. Absence of planning to support later life development, career and job changes *was* seen in most countries (though not Spain) to be an inhibiting factor. Segmentation of the workforce according to various criteria (e.g. skills, gender, agency workers, gender) *was* understood to be a barrier to the employment of older people in all countries (apart from Italy). Union participants in the UK observed that older workers who are most in need of support to maintain employment (for example, requiring training in order to do their jobs more effectively) were often the least likely to request it because they did not want to be seen as a burden by their employers. It was also observed that both older workers and managers are reluctant to have conversations about retirement plans.

20. Engagement and scope of active ageing

There was no evidence that workshop participants were to any degree, opposed to the idea of active ageing, though how much did they engage with it? There was an element of indifference in Spain and Italy, although this seems to have been modified into interest once the issues had been explained. Reps in most countries had been “somewhat knowledgeable” about active ageing before attending our workshops and in Spain and the UK had been keen to be proactive. Participants accepted the conceptual framework of active ageing in all countries. Health issues were generally seen as an important ingredient of an active ageing framework and opinion differed on the matter of whether working was central to active ageing, with participants in Poland and the UK supporting this proposition whilst in Italy and Spain they disagreed with it. Generally however, participants accepted that the retirement process inflicted a sense of loss on individuals as they gave up work. Participants in all countries agreed with the proposition that active ageing was broader than simply working longer. Participants in all countries but Spain agreed that active ageing embodied a gender dimension and that the genders adopted different perspectives on the issue.

21. Job adjustments for older workers

Participants’ expectations of the implications of extended working life were reported upon. All participants agreed that older workers should not be expected to work in the same job functions with the same pace and intensity of work as younger workers. Our Italian researcher reported negative views to the idea of making adjustments to accommodate older workers in arduous work, though this suggestion was received positively in all the other countries. There were some fears among UK participants that asking for adjustments to the work to accommodate workers with health issues could lead to problems with employers, but this view was not apparently shared in other countries. That said, participants reported that in some instances employees with poor health were obliged to retire or face dismissal. Participants in all countries except Italy, reported that there were sometimes problems of “low key ageism,” as a sort of implicit, harder to define form of age discrimination, facing older workers. Younger workers were sometimes given priority over older workers and in some instances younger workers pushed for concessions to favour younger workers at the expense of older workers. Some workplaces had organisational cultures which were unfriendly to older workers. Such examples of younger age bias are said to notoriously arise in the area of training opportunities for older workers, though how widespread and commonplace they are is difficult to judge on the evidence available.

22. Intergenerational issues

In all countries intergenerational issues were accepted as important (Spain, “a bit important”, other countries, “quite or very important.”) In all countries but Spain, there was felt to be an intergenerational divide in career paths and qualifications. In all countries it

was felt there was a link between the intergenerational divide and youth unemployment, but only in Spain was this considered a strong link.

23. Issues linked to the exclusion of older workers

Discussions took place in the four country sets of workshops covering a range of issues that may either promote or exclude older workers from employment. A lack of promotional opportunities was judged to be significant in Spain and the UK. Representatives in Spain and Poland shared the view that organisational cultures (including negative influences on how older workers are seen by co-workers) were a key factor. Attendees from the UK saw the presence of casual work, and lack of both promotional and training opportunities as being closely linked to older worker exclusion. In Spain the twin factors of lack of training and age unfriendly age cultures were deemed to contribute to the exclusion of older workers. In short, responses suggest that no single factor could be identified as the main reason why older workers are excluded from working. On the other hand, the casualisation of work, lack of opportunities for older workers to be promoted, age unfriendly bonus systems, poor training opportunities and ageist organisational cultures were all cited as excluding factors, though emphasised differently in the partner countries. Most of the participants appeared to resist false stereotypes of older workers. Union representatives and employers in all countries supported measures to further generational solidarity. Intergenerational mentoring was a specific case in point – no-one resisted the idea of this while some strong supportive statements were made about it and examples given of mentoring programmes in action.

24. Management responses to active ageing challenges

In discussions, we encountered numerous examples where there was a perception that older workers challenged the maintenance of high productivity in organisations. This view was observed in the UK building industry, for example, where workers complained that with ageing and less agile bodies they may not always be able to maintain the same pace of work as younger workers. Such perceptions were widely held by employers though relatively little debated in each of the countries. Union reps showed little opposition to the idea that management would want to remove lower performing workers. In Poland, reduced retirement ages may have added fuel to the elimination of less productive workers, with selective rehiring of valued workers now commonplace following the lowering of pension ages. In light of this we enquired how far workplaces had adopted measures to support high performance and productivity. Plans to eliminate older workers by early retirement were mentioned as happening in Spain and the UK. Only in Italy was the idea of retaining older workers to avoid having to recruit and retrain younger workers, reported as commonplace. In the UK an additional strategy was noted – that of using older workers as non-permanent, highly flexible forms of labour, as applied (for example) in the system known as zero hours contracts.

25. Sustainability

Not all employers seemed sensitive to the business case for older workers, Italian and UK employers seeming to be most aware in this respect. There was some, *limited*, evidence of work being adopted to develop the business case for sustainable and active ageing. In Spain, a specific response aimed at a targeted group within the workforce was mentioned, driven by the goal of making working more sustainable. In the UK and Italy examples could be found of joint (employer and employee) working groups to develop strategies supporting active ageing, while in Poland and the UK other examples were seen where the lead for development of the business case and sustainable working programme had come directly from a management task group to consider methods of working to support older workers remaining longer.

26. Financial and other support for active ageing

Three examples were given of sources of financial support for active ageing. The first was the Bilateral Funds established in Italy, which offer an innovative and interesting new source to “joint-ness” in administration of various activities to support and provide care for workers, including occupational health services and training facilities. (The funds are set up and regulated by collective agreements and underpinned by statute law in the Italian system. While the major share of funding the bilateral funds is borne by employers there are also contributions by workers themselves, thus conveying a co-operative “joint ownership” ethos.) The second example quoted was from the UK where an innovative foundation called the Centre for Ageing Better has been funded by the National Lottery, operating as a small but well-endowed agency focusing mostly on collection of evidence and supporting a small number of local programmes in partnerships with strategically selected local authorities. In contrast, also in the UK, the Department for Work and Pensions (through its *Fuller Working Lives* programme), the Business facing charity Business in the Community, employer’s advocacy group Employers’ Network on Equality and Inclusion and the semi-independent advisory body ACAS, all provide advice on employer good practices in the form of information for general consumption.

It may be noted that while the Italian Bilateral Funds do not embody any explicit “active ageing” dimension, their specific support for skills training, occupational health and reorientation programmes for displaced workers, all amount to tangible support for active ageing measures. Compared with these tangible interventions, the British approach seems somewhat akin to an informed variety of encouraging employers to follow good practices supporting extending working lives. The Italian Bilateral Funds model offers employers and unions a strong push towards joint engagement but lacks the prescriptive element of the British campaigning approach aimed at influencing employers to follow chosen exemplars of good practice. However, it is significant that in the main the good practice exemplars chosen are in very large companies with professionally led HR departments, while SME

organisations are largely ignored. In none of the countries are tangible resources or training offered to support joint approaches to active ageing. Moreover, there is no reference in any of the published materials to *collective or social dialogue* with employees being a necessary element in achieving change – all of this is despite the catalogue of aims set out in the framework agreement on active ageing.

27. Collective voice expressing needs of older workers

Starting with the proposition that a *collective voice* is central to the idea of social dialogue, the project partners sought information about the form of collective voice used in dialogue over active ageing and examples of such discussions in action. Notwithstanding the very low levels of formal joint engagement with active ageing, all the partners reported that directly or indirectly, in some way, a collective voice *had* been used to raise active ageing issues. In most cases this had been done opaquely, without any labelling of the issues in such a way as to identify them as an “active ageing matter.”

In most cases, the collective voice seems to have taken the form of a collective bargaining process or a collective agreement of some kind. Our Italian partner observed such activity in multi-generational working groups, representation of individual union members on issues concerned with ageing and through the application of instruments such as multi-employer, national or regional agreements. In the UK, various means had been found to raise active ageing issues, including through employee networks, health and safety procedures or in pursuing cases involving individual employee rights. Hence, while formal social dialogue discussion did not always prioritise a coherent “agenda of active ageing”, there were various ways by which *active ageing* had indeed crept into joint discussions.

Opportunities seemed to crop up in different, occasionally unexpected ways. Our Spanish researcher for example, commented that there had been plenty of discussion on health as a “quality of working life” issue, and though this was not earmarked as specific to the *active ageing* agenda it was a potential starting point for such future discussions. The same partner noted an agreement on the reduction of working time for people over the age of 62, which was subsequently extended to people in younger age groups. (In so doing however, the agreement had lost some of its force as the number of people embraced by it had become unmanageably large.) In Italy, contractual discussions had included measures to promote active ageing, for example through transformation of permanent full time jobs into part time jobs on fewer hours with the aim of creating an early retirement “glide path” for some workers and job opportunities for younger new comers.

Age issues were sometimes dealt with under procedures for individuals to raise grievances. Bilateral policies negotiated at sector level were sometimes applied and discussed at company level. In the UK, employers and unions had engaged collectively over such issues as pension ages, health and safety matters and working time – all clearly being relevant to active ageing. In the National Health Service a major review of pension ages and retirement

had prompted serious examination of working conditions in a bi-lateral central group known as the Working Longer Review Group.

In many cases therefore, while in each of the four countries there had been only formal recognition of the “active ageing agenda,” and very little evidence of active ageing being tabled as a formal programme for discussion between the social partners, it turned out that there were instances where such social dialogue was indeed taking place, on some or other aspect of active ageing. The formality of a set-piece negotiation or adoption of a holistic “age management” programme, might be relatively rare, though on closer scrutiny, discussion relevant to active ageing was far from absent.

28. Good practices to support active ageing

Our research partners provided information on the good practices observed to support active ageing. Eleven examples of good practices were offered for comment. No country reported an example of phased retirement in operation. Only the in UK was it stated that support in financial planning was offered to employees. (This is common among larger UK employers only). All countries cited the presence of flexible working options, though in Spain the guarded statement, “some initiatives in place,” contrasted to the UK’s “widespread.” Health and well-being promotion was supported by bilateral bodies in Italy and is common in the largest UK companies. Only the UK researcher cited examples of initiatives to support one gender, (menopause support and good policies were mentioned). Measures to support lifelong learning were present in most countries (though not mentioned by our Spanish researcher). Support for mid-life career reviews was reported in Poland and the UK, while Italy, Poland and the UK had examples of good practice in relation to later life recruitment and job transfers. Our Italian researcher reported interesting developments in the field of mentoring and tutoring of older and younger workers in forms of intergenerational knowledge exchange; also in Italy it was reported that intergenerational solidarity pacts were used. More detailed comments on most of the above good practices are provided in the main report showing a number of variations in approach from country to country. The range of good practice interventions reported showed relatively few cases of cultural specificity however – good practices in one country could in most cases be found replicated in another. The main evidence report explores each of the foregoing good practices in more detail giving insights from participants.

29. What can help?

The research partners commented on the types of support which they thought would help them in future social dialogue over active ageing. In Spain and the UK all five of the proposed “tools” were supported, that is to say, a manual of good practice, a tool to help develop the “business case” for active ageing, practical tools of some other kind (for example, an age audit tool was suggested), a training package or course and a community or

network of practitioners with an interest in active ageing interventions. Specific suggestions on the content of the training module were offered by our Spanish partner (see the full report for details). The Italian partner emphasised the importance of case studies and examples of collective agreements showing how interventions were implemented in practice. The Polish partner endorsed the need for training to support the social partners in dialogue around active ageing and stressed the need for practical information.

30. Answers to our five questions

In summary, answers to the questions which structured the project are as follows:

How do different industrial relations (IR) structures facilitate and/or inhibit the dissemination and implementation of collective agreements on active ageing?

The four countries represented contrasting IR structures and ideologies. Two foci emerged from comparisons between the case studies. First, there were differences at which levels at which social partners engage in dialogue on active ageing with those in Poland focusing on top-down dissemination via the Council of Social Dialogue and Solidarnosc movement and the UK focusing on workplace and local measures. This has practical implications for how the Framework Agreement will be disseminated and embedded in human resource management policies and practices. In some cases, national union movements and associations will prioritise developing standardised approaches to developing platforms for dialogue within sectors and workplaces. In others, local union representatives and managers will need to be equipped to not only develop bespoke approaches to active ageing, but also to share practices in terms of starting a dialogue and embedding age positive HRM.

Second, although there were relatively few programmes on active ageing which workshop participants cited, they were able to reflect on off the shelf measures developed through social dialogue which could be adapted to address challenges of ageing workforces. Examples included the bilateral fund, intergenerational compacts, UnionLearn programmes and the right to request flexible working. This means that social partners do not necessarily need to develop new HRM interventions on active ageing but to find ways to adapt existing approaches to careers, health management, lifelong learning, flexible working and performance management.

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

Both institutionally and culturally, there were significant differences to perceptions of active ageing both in terms of importance and emphasis. An early retirement route remains open in Spain and the Polish government has lowered the State Pension Age. Social partners in Spain considered the issue as marginal in importance, although on an impressionistic level could see the value of new approaches to managing workplace ageing.

By contrast, social partners in Italy and the UK were more accepting of the need to develop active ageing policies and practices, in large part because older workers have few routes out of work before normal pension age. There was a recognition that many older workers, especially those with low skills or in physically demanding and stressful work, are most at risk and therefore in need of interventions to support those who are having to work longer.

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

Awareness of the Framework Agreement was very low across all four countries. However, social partners were aware that national governments (with the exception of Poland) were putting in place public and social policies to encourage and/or compel longer working lives. Social partners were generally aware that many older workers are having to work longer because of changes to both state and occupational pension rules as well as under-saving to retirement. Understanding of pension rules was relatively low and there was a recognition that the complexity and fluidity of retirement routes created uncertainty for older workers in planning their retirements on the individual level and employers in managing retirement and workforce planning collectively.

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

Social partners discussed the challenges of striking an intergenerationally fair approach to managing workplace ageing. Those in Spain and Italy, especially union representatives, expressed the strongest concern about older workers who delay retirement of displacing younger people who are trying to access sustainable work. Union representatives in the UK discussed generational differences in terms of access to training and accreditation and the impact of rising skills requirements for jobs is resulting in older workers feeling passed over in their careers. Social partners discussed ways in which to reengineer early retirement pathways to structures for encouraging intergenerational support. For example, in Italy, intergenerational solidarity pacts are being organised to encourage older workers to extend working life by mentoring and supporting younger workers into sustainable work.

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

Few examples of active ageing good practice were discussed in the workshops and participants speculated about how relevant such case studies could provide relevant approaches in different contexts. Age champion case studies were sometimes seen as overwhelming for social partners as they reflected comprehensive reviews and reforms of approaches to age management. The striking feature of workshop discussions in all four countries was that new approaches to managing age are emerging in order to address workforce challenges which might not seem on the surface to be an age issue. Skills shortages, motivation, career management, economic inactivity and turnover were all

identified by social partners as drivers for starting a dialogue on active ageing. Workshop participants discussed sharing approaches for addressing immediate problems facing workplaces which they manage or represent workers.

Consequently, they saw active ageing as a long-term issue which is most likely to be resolved through incremental innovations developed to meet a range of challenges. However, they saw some aspects of active ageing as more intractable and difficult to resolve through traditional collective bargaining, for example the status of older unemployed people or those in casual work. New approaches to social dialogue which include elements of collective bargaining, campaigning and engaging with government, NGOs and other stakeholders were seen as ways in which employers and unions could collaborate and extend dialogue to develop, pilot, embed and exchange new approaches to managing workplace ageing.

31. Appendix 1: Workshop protocol

ASPIRE Workshop protocol

Workshop: Union representatives

- What does your union think about a multi-generational and diverse work places?
- What do you think older workers want in terms managing extended working life?
- What is being done now to support older workers and promote active ageing?
- How can social dialogue help?

Discussion 1: Active ageing from a union policy perspective

- How well does your union and unions generally represent older workers? Younger workers?
- Is the extension of working lives in conflict with the right to retire? How can unions promote older workers' employment rights *and* the right to retire?
- Are older workers' employment interests in conflict or consistent with those of younger workers? Are there shared goals?
- Are there workplace needs of specific groups of older workers (e.g. women, men, BME, people with disabilities) that need addressing by unions?
- Does your union have initiatives to support retired members in continuing to engage in the broader community?
- What is one thing your union could do better?
- How important is work within the context of active ageing?

Discussion 2: Active ageing at the workplace level

- How will workplace active ageing affect [COUNTRY] workplaces? Do you think that employers want/need older workers to delay retirement? Why/why not?
- Are there examples of good practice that you know of?
- What do you see as the barriers to good practice? How could they be overcome?
- Are union reps 'age aware'? What can help raise awareness?
- What kind of policies can help older workers whom you represent in pursuing work they value? What would make such working conditions more achievable?
- Are there ways in which career opportunities can be enhanced for both younger and older workers?
- What tools would help age aware union reps promote social dialogue on the subject of active ageing?

- Are there important people either within or outside the organisation who are important in the social dialogue on active ageing (prompts: retired workers, occupational health specialists, pension managers)?

Discussion 3: Supporting older workers in managing their careers

- What do older workers want in terms work and how/when they retire? Are their goals achievable?
- What Human Resource interventions could help older workers maintain employment (prompts: flexible working, lifelong learning, health interventions, job rotation)? Are those policies in place in workplaces you represent? If so, how have they worked? If not, why not?
- Can older workers in your workplace ask for adjustments to work which can help them achieve more fulfilling careers? What makes older workers unable to ask for help? Are there ways in which workplace reps can support older workers in asking for help?
- Are there ways in which intergenerational working can be encouraged/supported? Are there ways in which your union promotes ?
- What can union reps do to help older workers at the individual level get access to the support they may need in work?

Discussion 4: Active ageing through social dialogue

- How does dialogue in your workplace work well in promoting active ageing (at the organisational, workplace and individual level)?
- Are there examples of good practice which could be applied to dialogue on active ageing?
- How could things be done better?
- What would you like to see from employers in terms of promoting active ageing? From your own union?
- List five action points you think could improve social dialogue on active ageing?

Workshop 3: Employers

It should be up to each research team to decide how to introduce project, but you will need to provide the main research questions for the research projects. You may also want to circulate your national report executive summaries prior to the meeting.

Broad questions

- What does your union think about ageing work places?
- What do you think older workers want in terms managing extended working life?

- What is being done now to support older workers and promote active ageing?
- How can social dialogue help?

Discussion 1: Active ageing from a business perspective

- How well does your organisation manage older workers?
- Does your organisation value older workers? What are some of the reasons why you might think so/not?
- How well do older and younger workers work together? Are there conflicts in terms of goals or interests?
- Are there workplace needs of specific groups of older workers (e.g. women, men, BME, people with disabilities) that need addressing by the business community?
- How important is work within the context of active ageing?
- What is one thing your organisation/business community generally could do better?

Discussion 2: Active ageing at the workplace level

- What are the ways in which your organisation could benefit from active ageing (prompt: retention of older workers, skills transfer, flexible labour market, alignment with labour market)
- How important (if at all) are active ageing and other diversity issues for your employer at the corporate level?
- Are there HR policies now in place in your workplace to promote active ageing? If so, how have they worked? If not, why not?
- What do you see as the barriers to good practice? How could they be overcome?
- Are managers in your business 'age aware'? What can help raise awareness?
- Does your organisation do anything to promote intergenerational support to encourage younger and older workers to support one another? (eg mentoring, 360 mentoring, job sharing)?
- What kind of policies can help older workers whom you represent in pursuing work they value? What would make such working conditions more achievable?
- What tools would help age aware union reps promote social dialogue on the subject of active ageing?
- Is your company involved in encouraging workers to put something back into society through initiatives you support? If so, do you see any possible connection with the "Active Ageing" ideal?
- Are there important people either within or outside the organisation who are important in the social dialogue on active ageing (prompts: retired workers, occupational health specialists, pension managers)?

Discussion 3: Supporting older workers in managing their careers

- What Human Resource interventions could help older workers maintain employment (prompts: flexible working, lifelong learning, health interventions, job rotation)? Are those policies in place in workplaces you manage? If so, how have they worked? If not, why not?
- Can older workers in your workplace ask for adjustments to work which can help them achieve more fulfilling careers? What makes older workers unable to ask for help? Are there ways in which workplace reps can support older workers in asking for help?
- Can older workers in your workplace ask for adjustments to work which can help them achieve more fulfilling careers?
- What can managers do to help older workers at the individual level get access to the support they may need in work?

Discussion 4: Active ageing through social dialogue

- How does dialogue in your workplace work well in promoting active ageing (at the organisational, workplace and individual level)?
- Are there examples of good practice which could be applied to dialogue on active ageing?
- How could things be done better?
- What would you like to see from employers in terms of promoting active ageing? From your own union?
- List five action points you think could improve social dialogue on active ageing.

Workshops of both employers and union reps

Presentation of previous two workshops

- Opportunities for improved social dialogue on active ageing
- Barriers to good practice
- Five goals of each side

Reaction from group

- What are the issues of commonality? Are there some shared goals?
- What do you see as the points of conflict? How can they be resolved? Can they be?
- What would be an achievable set of goals at the organisational, workplace and individual levels?

Online tool to promote active ageing through social dialogue

- What tools/resources do age aware managers and union reps need?
- What support could be provided by government (including LEP), employers, unions, and other stakeholders?
- What should an online tool contain?
- Would you be willing to contribute ideas and advice to such a platform?

Wash up session

- What will you take away from these sessions in changing the practices of your union/organisation?
- What advice would you give other managers/union reps in promoting active ageing?
- Would you be willing to contribute ideas and advice to such a platform?
- Would you like to continue the group discussion (eg through network platform)?

32. Appendix 2: Interview topic guide

National Stakeholder Interviews

Thank you for agreeing to take part in this interview. As you know, this is part of a European Commission funded research project (Active Ageing through Social Partnership and Industrial Relations Expertise (ASPIRE)) to contrast and compare age management in the United Kingdom, Italy, Poland and Spain and the role of social partners (employers and unions) in developing, piloting and embedding Active Ageing approaches to work.

The interview should take no more than 1½ hours at the maximum, and everything you tell us will be confidential.

To make sure we have a reliable record of the conversation, I would like to record this interview which will then be transcribed for analysis by the ASPRE research team. Once the interview is transcribed, only team members will have access to material which identifies you and your firm. Transcripts and recordings will be stored in a secure place consistent with the UK Data Protection Acts.

The European Commission, who commissioned this research, wishes for transcripts to be stored in the UK Data Archives so they may be available to other researchers interested in older workforce issues. For these reasons, transcripts will be anonymised, removing your name, your employer's name and any information which could identify you or your organisation.

Could I ask you to carefully read and to sign this form now, to confirm that you understand the terms on which we will use the material? We need the form for European Commission records, and the second copy is for your records.

1. First, could we start off by you telling me a little bit about your organisation.
 - a. What is your organisation's interest in Active Ageing in the workplace?
 - b. How do your members generally feel about Active Ageing?
2. How do you define Active Ageing as a UK/EU priority?
 - a. In relation to employment (eg work, self-employment, extended working life)
 - b. In relation to social participation (e.g. caring, intergenerational support, volunteering, family, social inclusion)
 - c. In relation to independent living (e.g. financial security, physical health, learning)
 - d. In relation to capacity and enabling environments (e.g. mental health and well-being, social connectedness, healthy life expectancy)
3. Do you think that one of the dimensions of Active Ageing is/should be a priority for social partners in the UK? If so why? How do you see the relationship between these priority areas?
4. How important do you think a priority do you think Active Ageing is for:
 - a. The trade union movement
 - b. Employer/management organisations such as CIPD and CBI
 - c. The "age lobby" such as Age Concern
 - d. The Government
5. How important do you think active ageing in work is to the British economy and society?
 - a. What, if any, reasons do you think employers should pay attention to age diversity?
 - b. Do you think age diversity in the workplace will grow in importance in the future?
6. How would you describe industrial relations in the UK at the moment?
 - a. What are the most significant issues facing social partners (prompts: austerity, youth unemployment, wages, skills shortages)
 - b. How are social partners dealing with such issues at the moment?
 - c. What are your main concerns about IR at the moment?
7. How important do you think active ageing is to British employers and trade unions?
Prompt- differences by sector, size, occupations
 - a. What are the reasons why employers are adopting active ageing policies?
 - b. What are some of the barriers to active ageing polices
 - c. Do you think employers in different sectors or regions of the country have different views on age diversity (prompt- skills shortages, unemployment, likelihood of pension schemes)

- d. How important do you think age diversity is to British workers? (prompt- differences in views between older/younger workers; high/low skilled; gender; sector)
 - e. Do you think unionized and non-union organisations are addressing ageing workplaces differently? If so how?
8. We know from previous research that older workers are more likely to consider staying in work longer if they have more choices in how they work, their working hours, and development opportunities. How likely do you think British employers are to:
- a. Allow older workers to change or reduce their working hours
 - b. Train older workers (prompt- short and long term training)
 - c. Recruit older workers for job vacancies
 - d. Manage workplace stress in order to avoid employees taking early retirement
 - e. Managing health and safety in order to avoid workers going on incapacity
 - f. Addressing performance problems early
 - g. Discussing retirement plans with employees
- (PROMPT- Differences in sector, region, size of org)
9. We also know that policies which are written in HR departments or at a senior level are not always implemented in the workplace. For example, line managers may be unaware of corporate policy or ignore it. How effective do you think employers are in implementing age diversity policies?
- a. Do you think employers prioritise age diversity as a corporate policy?
 - b. Do you think line managers regularly consider ways in which to enable their older workers to stay active longer?
 - c. Have there been changes as a result of the age discrimination regulations?
10. Are there examples of good practice in relation to active ageing which you think employers and unions can learn from (prompt: Age Champions, collective agreements)
11. Do you think unionised workplaces are implementing the regulations differently from non-unionised workplaces (PROMPT- collective agreements, employee representation, representation of young versus older workers, adherence to policies and procedures, resolving or avoiding conflicts)
12. a. How do you think older workers are influencing age diversity practices in non-unionised workplaces? (Prompt- quality circles, appraisals, newsletters, suggestion schemes)
13. British employers tend to adopt, or at least try to adopt, strategic HRM practices, aligning HR policies with business objectives. Do you think there are business case

reasons for employers to adopt age diversity policies and practices? Are there limits to the “business case” for employers?

14. Finally, as part of the project, we will be developing training modules for managers and trade union representative in developing, piloting and embedding active ageing policies.
 - a. Do you have a view on the best way to deliver such training?
 - b. Are there good practices which you could recommend?
15. Is there anything we have missed?

Thank you for your time. We would like to keep you updated on the research.

33. Appendix 3: Coding structure

ASPIRE

1. Barriers

a. Individual issues

- i. Career progression
- ii. Family issues and caring responsibilities
- iii. Finance
- iv. Health issues
- v. Job identity and motivation
- vi. Job security
- vii. Life planning
- viii. Physical capabilities
- ix. Retirement plans of staff
- x. Stress
- xi. Training
- xii. Unemployment and under-employment

b. Industrial relations systems

c. Macro-economic and social issues

- i. Cultural issues
- ii. Class issues
- iii. Demographic change
- iv. Economic issues

- v. Legal and social policy issues
- vi. Regional issues
- vii. Sectoral issues
- viii. Unemployment and under-employment

d. Organisational issues

- i. Communication
- ii. Ergonomics
- iii. HR policies
- iv. Recruitment
 - v. Training staff
 - vi. Work processes
 - vii. Work intensification
 - viii. Workforce management
- ix. Flexibilisation
- x. Skills

e. Social partner issues

- i. Employer associations
- ii. Unions
- iii. Pensions and the right to retire
- iv. Promotion of equal opportunities

2. Facilitators

a. Individual issues

- i. Family issues and caring responsibilities
- ii. Finance
- iii. Health issues
- iv. Job identity and motivation
- v. Life planning
- vi. Physical capabilities
- vii. Retirement plans of staff
- viii. Stress

b. Industrial relations systems

c. Macro economic and social issues

- i. Cultural issues
 - ii. Class issues
 - iii. Demographic change
 - iv. Economic issues
 - v. Legal and social policy issues
 - vi. Sectoral issues
 - d. Organisational issues
 - i. Communication
 - ii. Ergonomics
 - iii. HR policies
 - iv. Work processes
 - v. Work intensification
 - vi. Workforce management
 - vii. Flexibilisation
 - viii. Monitoring
 - ix. Organisational change
 - x. Skills
 - e. Social partner issues
 - i. Employer associations
 - ii. Unions
 - iii. Community building
 - iv. Pensions and the right to retire
 - v. Promotion of equal opportunities
 - vi. Supporting active ageing
- 3. Good practice on Active Ageing
 - a. Policies
 - b. Financial planning
 - c. Flexible working
 - d. Gender

ASPIRE Workshop Findings

- e. Healthy workplace initiatives
 - f. Life planning
 - g. Lifelong learning and training
 - i. apprenticeships
 - h. Recruitment
 - i. Retirement planning
 - j. Work life balance
 - k. Processes
 - l. Collective bargaining
 - m. Consultation with employees
 - n. Mutual learning
 - o. Performance management
4. Intergenerational issues
- a. Concerns about intergenerational conflict
 - b. Intergenerational support
 - c. Intergenerational work teams
 - d. Job sharing
 - e. Mentoring
 - f. Perceptions of younger workers
5. Perceptions of active ageing
- a. Ageing process
 - b. Active ageing defined
 - c. Ageing affecting ability to work
 - d. How work fits into active ageing
 - e. Employer association perceptions
 - f. Local union rep perceptions
 - g. National union policies
 - h. Union movement campaigns on pensions and retirement

ASPIRE Workshop Findings

- i. Organisational perceptions
 - j. Corporate policies
 - k. HR managers' perceptions
 - l. Line managers' perceptions
 - m. Workers' perceptions
 - n. Perceptions of other stakeholders (eg government or regional bodies)
 - o. Social partners associations
 - p. employer associations
 - q. Union perceptions
 - i. Local union rep perceptions
 - ii. National union policies
 - iii. Perceptions of EU agreement
 - iv. Union movement campaigns on pensions and retirement
6. Responses to active ageing
- a. Company responses
 - b. Regional coordination
 - c. Sectoral approaches
 - d. Social dialogue responses (ie coordination between unions and employers)
 - e. Union responses
 - f. Training local reps
7. What can help
- a. Case studies
 - b. Community of practice
 - c. Training
8. Participants Details

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