

Active Ageing
through Social Partnership
and Industrial Relations in Europe.
Evaluation Report

Professor Stephen McNair



ASPIRE Project

Final evaluation report

The ASPIRE project was funded by the European Commission to investigate the place of active ageing in industrial relations in four member states. It was carried out between January 2017 and March 2019.

This report is an independent evaluation of the project, carried out as part of Workpackage 9 of the contract.

The purpose of the evaluation was both formative and summative. The evaluator worked alongside the project partners to comment on progress and lessons learned, and assist in modifying plans where appropriate. He attended all but one of the project team meetings, and monitored the online and telephone discussions between the partners. At the end of the project he carried out formal semi-structured interviews with each of the national coordinators.

This is the final evaluation report, based on that work. It covers:

- compliance with the agreed contract and budget,
- outputs – planned and unplanned,
- answers to the research questions¹,
- the impact and sustainability of the work,
- project processes and organisation
- lessons learned

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¹ The report summarises some of the key research findings, but does not repeat the extensive material which is already published in the project reports (see annex).

The ASPIRE project

The ASPIRE project had two overarching objectives:

- 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.
- to use that understanding **to develop resources and materials** to support social partners in responding more effectively to the challenges of an ageing workforce.

The work was coordinated by Professor Matt Flynn from the UK², and carried out by the five project partners:

University of Newcastle – Project Contractor
Fondazione ADAPT in Italy.
University of Granada
University of Lodz

The project intended to work with employers and trades unions in a range of occupational sectors in the four countries.

The project's research questions were:

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

The project was to produce three deliverables:

1. A one day training module for HR professionals

² Professor Flynn was initially at the University of Newcastle, but moved in the early stage of the project to the University of Hull

2. A web based resource for sharing good practice
3. A social network for practitioners

The project comprised 9 workpackages:

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

Note on definitions

“Active Ageing” is a term used in a range of ways across the EU. For the purposes of this project the definition in the EU’s Active Ageing Framework document was adopted. This is:

“helping people stay in charge of their own lives for as long as possible as they age and, where possible, to contribute to the economy and society”³.

Surprisingly, the Framework document has only been published in English, which makes it inaccessible to many social partners⁴.

“Social Partner” is also used in a range of ways in member states. In some cases it is used only to refer to Trades Unions and formal Employer bodies, in other cases it is extended to include a range of other economic and social actors. In this report “social partners” refers to the employer and trades union and third sector organisations which took part in the work at local/national level.

³ DG Employment, Social Affairs and Inclusion (March 2017)

<https://www.buinesseurope.eu/publications/european-social-partners-autonomous-framework-agreement-active-ageing-and-inter>

⁴ The Spanish partner translated the document into Spanish for use by its social partners and others:

<https://www.agediversity.org/wp-content/uploads/2019/04/Acuerdo-Marco-sobre-Envejecimiento-Activo.pdf>

The term “project partner” is used to refer to the four agencies directly carrying out the national project work⁵.

The Project coordinator, with overall responsibility for the project was Professor Matt Flynn of the University of Hull⁶.

⁵ The Universities of Newcastle, Hull, Granada, Lodz, and Fondazione ADAPT in Italy.

⁶ Professor Flynn was at the University of Newcastle at the time of the original bid, and moved to Hull around the time when the project began. However, Newcastle remained responsible for the administration of the project throughout.

Contract compliance

All four national partners took part throughout the project, and all the planned activities were carried out. As one would expect, some activities were more successful than others, there were minor adjustments to timetable and finance in response to events and the other commitments of project partners. An extension to the project end date was negotiated to enable some of the final work to be completed. However, none of these prevented the planned activities being carried out satisfactorily. The research questions were explored thoroughly in all four countries, and the findings shared between project partners through both written reports and face to face meetings. Those findings, and their significance, are commented on below. The workshops with social partners were held, and most countries held more workshops than originally planned. The project discussions and workshop records were recorded and analysed, materials were produced for social partners to use in improving active ageing practice in industrial relations contexts, and placed online as training modules. As a result of the project, we now have:

- **a substantial written account**, in the four national reports, and the overview report, of the place of active ageing issues in industrial relations in Italy, Spain, Poland and the UK;
- **a better understanding** of the nature and causes of national differences in these issues;
- **a body of publicly available resources** to support employers and trades unions in managing an ageing workforce in those countries;
- **a set of training modules** for use in developing active ageing policies and practices;
- **an online framework** for interaction between academics and social partners interested in the issues of age management;
- **a small but potentially influential group of academics** in four countries with a greater understanding of the issues, and with potential and motivation to continue to develop research, policy and practice.
- **A cross European network of social partners** to exchange good practice on workplace active ageing.

The project was carried out within the agreed budget, and expenditure was incurred on legitimate activity. There was some minor redeployment of money between budget headings (approved through Newcastle University) in response to emerging needs. For example, some underspends on travel were used to finance translation of documents. We have also learned more about the opportunities and challenges of this form of transnational collaboration.

Outputs

National reports

The plan was that each country would produce a national review of research and policy issues on the relationship between industrial relations, social partnership and active ageing. These reports were all to be prepared to an agreed common format, and they would then be synthesised into a single overview report.

Initially, a long questionnaire was designed for the national reports, but after discussion it was felt to be too complex for use by the partners, and it was simplified. Despite this, in the event, the national coordinators took somewhat different approaches to the task, the national reports were rather different in format, focus and style, and there were fewer concrete examples of documents and practice than expected. This made the task of synthesis more difficult, especially since the UK researcher, who assembled the consolidated report, was only recruited after the start up meeting in Bergamo, when the overall shape of the reports had been negotiated. Desk research was thorough and extensive with a good gathering of relevant data, and a clear account of the history of the issues. The final reports were significantly more extensive and detailed than planned. This makes them more valuable, but the additional work did cause some disruption to subsequent work.

Workshops

A key element of the project was the 26 workshops with social partners. Each country carried out a pilot workshop, using a common structure designed following the national reviews of research and policy. The findings from those pilots were shared at a project team meeting in Granada, and the structure modified. Further workshops were then held in all countries. In most countries more workshops were conducted than originally planned, as interest among social partners developed. They attracted a diverse range of participants from a variety of locations. However, they took longer than expected to set up, because, in many cases, social partners were not aware of the issues and their importance.

Workshops were recorded and the transcripts analysed using NVivo qualitative analysis software, which was new to some partners.

In most countries project partners also contributed to events organised by other agencies or social partners. This was helped by the fact that all four project partners already had networks among relevant agencies and individuals and programmes of activity which included events on related topics, into which active ageing issues could be inserted.

The result of this phase of the work was a very substantial working document, analysing the findings from the workshops in detail. This informed the development of training resources in Workpackages 5-7. However, the linkage was sometimes less direct than expected, partly because the evidence was gathered in the language of the relevant country, and not translated. It was therefore mediated orally by the national coordinators, some of whom would have welcomed more time to discuss this material

Online activity

A project website was created, hosted by the Italian partner. This presented basic information about the project, links to the partners and a repository for the project reports and relevant documents from a variety of sources.

A project blog was created, and a range of issues were dealt with. All partners contributed, although the majority of material came from the UK partners, partly reflecting the role of the English language, but also perhaps because debates on active ageing are more advanced in the UK than in the other countries. Material from the blogs appeared in “People Management”, and HuffPost. There was some debate about how much effort should go into editing blog posts, and there were some delays in material becoming available.

A social network infrastructure has been created, linked to the Facebook Age Diversity Group. This includes a mailing list of experts, and allows users to post queries. It continues to be monitored and supported by the project coordinator.

A training module

The intention was that the project would create an online training module based on the materials gathered and developed by the project, for use by social partners in considering active ageing in industrial relations contexts.

A substantial body of relevant material was gathered for this purpose in all four countries. This included national and European policy documents which, in some cases, were translated into the relevant language for the first time by the project staff. It also included practitioner materials, guidelines, policy documents and research evidence, as well as video interviews with social partners about the importance of active ageing policies and strategies.

The materials were used in workshops organised by the national coordinators. Feedback from over 60 participants across the four countries was very positive. In the Spanish case more than 90% of participants responded positively to questions on the relevance and effectiveness of the materials. In the UK 85% said that the online module would be useful.

The materials were organised and made available on the website, with some guidance on how they could be used. A range of training options were created and placed online, as required by the project contract. At present this material is rather “text heavy” and is more valuable as a resource for trainers than for direct use by practitioners. Newcastle University has agreed to finance further work to produce a version aimed directly at the latter group.

Additional products

The project generated a range of outputs beyond those specified in the original proposal, including:

- additional events to disseminate the findings with a wider range of partners. This included seminars on research findings, careers guidance implications and long term unemployment, with Trades Unions, employer bodies and academic research groups. The UK plans a substantial dissemination event in the Autumn

of 2019, linked to the seminar programme of the London School of Economics and the Age and Employment Network. The Polish partner will be presenting the project findings at a major employer conference in the Autumn;

- the translation of key national and European policy documents (including translating the EU's 2017 Active Ageing Agreement into Spanish – the original, being only available in English, was not useful to social partners who speak little or no English);
- extending the website to include a repository of relevant documents beyond those generated by the project itself;
- embedding the findings in the ongoing work of the project partners – including topics in teaching programmes, and inclusion in the International Certificate in Intergenerational Learning (Spain), and contributing to newsletters (the ADAPT agency has a very extensive network of social partners across Italy);
- Using the project as a case study of academic research in the UK's research quality assessment process, and as part of an academic project in Poland (the STAY project).

Answering the research questions

The project proposal identified five major research questions. The project addressed all these questions at length and the conclusions are discussed in detail in the national reports and the Consolidated Summary report. This section briefly summarises some of the key points.

The industrial relations, political, and social context

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

The project has given us a better understanding of:

- the diversity of industrial relations contexts, especially in countries which have not been leaders in European age policy developments
- the diversity of labour market contexts
- the limitations of change models based on social partnership, which means very different things in different countries
- National differences in terms of top down and bottom up industrial relations strategies

Key issues include

- **Employment rates:** interest in the issues is related to overall labour market conditions, which varied substantially between the four countries.

- **Linkage to broader agendas** – the issues were more positively received when set in the context of other priorities, including green competences, sustainable workplaces, quality work, intergenerational issues, and workplace health and safety
- **Retirement policies:** retirement policies vary greatly. For example, in the UK compulsory retirement is unlawful, while Spain retains a compulsory retirement age for public servants (including University staff) of 70.
- **Pension systems:** Income replacement rates vary significantly between the countries which affects the pressure on workers to delay retirement.
- **Government policies:** policies in related areas can have a major impact. For example, a freeze on public sector recruitment can limit or accelerate interest in active ageing.
- **HRM drivers:** Full employment provides an incentive for employers to innovate in age management, but companies are often driven by costs, and employers are particularly concerned about whether older workers are more or less productive.

Perceptions of age and employment

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

The project has given us a better understanding of:

- Limitations of European level intervention, especially the low awareness of European policies like the Framework agreement
- The impact of institutional structures like national and sectoral based collective bargaining (or lack thereof) on the promotion of workplace active ageing.
- The fact that “age policy/strategy” is not widely recognised as an issue or a priority, and “age management strategies” are not widespread. However, the issues which an ageing society raises are more widely acknowledged, but they are not framed as “age policy” or enshrined in formal strategies.
- The diversity of drivers for change – demography, business case, equality – and the different impact each has in each country
- The “productivity paradox” remains a concern. How far are older people less productive?

Key findings include:

- **Positive responses:** the project was reported as “pushing at an open door”. Although active ageing is not widely recognised as a concern, when the issues are explained, the response from employers and trades unions is generally very positive, and mutual interest in better management of ageing is acknowledged.

The constraints on change are generally seen as time and money, not opposition in principle. Employers were particularly concerned about the cost implications of changes in policy or practice.

- **Attitudes to retirement vary:** greatly between countries. Although there is a clear trend towards later retirement, and in all countries except Poland this is reflected in law (retirement ages, pension ages etc) in many places there remains an early retirement culture which sees retirement as liberation and sets expectations which affect behaviour.
- **Awareness of the issues varies** between countries: employers and Trades Unions are much more aware of the issues in the UK than in Spain or Italy.
- **The pace of change varies:** in some countries Trades Unions are reported to be responding slowly, in others much more rapidly.
- **Change requires understanding of workplace cultures:** active ageing needs to be embedded in the distinctive culture of particular firms and sectors.

Responses to European and national policy

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

The project explored levels of awareness of European and national policy on ageing and industrial relations.

Key findings include:

- **Formal policy papers have limited impact** on the ground. Progress can also be hindered by conflicting policies, at European, national and sub national levels
- **Legislation can be effective** in producing change in some contexts, sometimes through formal enforcement, at other times through cultural impact on expectations.
- **“Social partnership” is not universally recognised** as a concept, and is not always seen as relevant to the age agenda
- **Sharing good practice** is a more popular strategy than formal policies or codes. Both employers and Trades Unions are more likely to take a pragmatic approach than a policy led, strategic one. Even when broadly defined, formal policies seem to have limited impact when they do exist.
- **Influence and communication** – many of the people and organisations who are key to behaviour change are difficult to contact, and the roles and location of key players are very different in different countries.
- **Language is important:** the language of “successful ageing”, etc is not always helpful in fostering understanding or encouraging implementation. There were also unexpected assumptions, for example, that “older workers” means only people below state pension age.

- **Lifelong learning:** there is some recognition that lifelong learning is important to enabling people to stay longer in work, but provision to support this is limited.

Intergenerational issues

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

One major concern for social partners is the potential for competition between young and old in the labour market.

Key findings include:

- **Intergenerational issues vary according to broader labour market conditions:** The issue was most contentious in Spain and Italy, where high levels of youth unemployment made people initially suspicious of policies which extended working life for older people. During the course of the project, Poland moved from that position to near full employment, and that anxiety was dissipated. In the UK, which had near full employment throughout, significant intergenerational tensions were not reported.
- **Concerns amongst older workers of being passed over** for career opportunities in favour of younger people with more recent training and qualifications were reported by some union representatives.
- **Concerns were reduced** when social partners were engaged in discussion about the demography, and the diversity of potential opportunities for both age groups.

Knowledge sharing

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

While there is a level of awareness of demographic change and active ageing issues among policymakers at European and national levels, this is much rarer among social partners at regional and local levels. This partly explains why awareness of strategies and HR practices for managing active ageing are underdeveloped.

Key findings include:

- **there was little awareness of active ageing as an issue among social partners** in any of the countries. The literature, and the workshops, both suggested that, though awareness was higher in the UK, where there have been national campaigns on the issue for some 15 years. Awareness of European policies on these issues was higher among national level organisations than among employers or trades unions.
- **few had heard of national or European policy initiatives on this subject.** However, there was little resistance when people were presented with the issues: most participants readily recognised the need to consider them; and were open to exploring strategies to improve policy and practice.

- **In some cases, trades unions are more aware of the issues** than employers

Impact and sustainability

It is always to be hoped that projects of this kind will have an impact beyond the life of the project itself. However, project based funding does not help with this. Participants have demanding teaching responsibilities and are also under pressure to generate new contracts. As a result, however valuable the work may be and however committed individual staff are, sustainability is always problematic.

Projects can also be successful in terms of their formal indicators, without necessarily producing change (publishing a report does not, in itself, produce change in behaviour). Nevertheless, there are reasons to believe that this project will have a continuing life:

- **Research expertise:** The project was effective in building partnerships for future work. Most of those directly involved were experienced in management or industrial relations, but new to the ageing issues. Most had experience of transnational projects, though sometimes of different form and funding. All were new to this set of partners. They are now much better equipped, and motivated, to pursue this work, at national and international levels. Some new junior researchers became involved for the first time. The project has extended their networks and understanding of relevant policy and practice areas. All the partners now have more experience of transnational projects, which equips them to undertake such work more successfully in the future. The Italian partner has already begun work on another project on intergenerational solidarity in the banking sector.
- **Mainstreaming:** All the partners intend to embed some of the ideas and materials in their mainstream work. This includes teaching on industrial relations and other issues. The Polish partner will be circulating material to its network of 120 employer and employee organisations. The Spanish partner is pursuing its contacts with national employers' associations, and is planning an event with the Chamber of Commerce in its home city of Granada. ADAPT has presented ideas and materials from the project in its internal HR newsletter. The UK partner has identified 16 specific contacts for further work, and continues to discuss the ideas in its seminars with LSE.
- **Policy impact:** In all countries, the project has enriched or stimulated discussion of ageing, work and industrial relations. In at least one country these issues were previously missing entirely from the agendas of employers and the state. In Spain, one of the leading trade unions (Workers' Commission) has supported the translation of the European Framework Agreement and is disseminating it, while the Andalusian branch of another trade union (General Union of Workers) is circulating information about the project's output to all its representatives. In Spain, the project report is being used internally by the

University to address succession planning, when half their own staff are due to retire within a decade.

- **Academic impact:** Most of the partners intend to use the project work to produce academic publications (some jointly), and have reserved funding to ensure that these conform to the EU requirements for open source publication. However, this was not part of the project contract, and nothing has yet been submitted for publication. It will inevitably be some time before anything appears in print.
- **Networking with social partners:** All the project partners now have better networks with social partners, locally and/or nationally, which can form a basis for future collaboration and promotion of the ideas and materials generated by the project. In at least one case, this was the first contact between the University and the social partners. In turn, social partners have been reporting positive responses to the issues from their own work.
- **Personal support:** some of the partners report positive support from other partners with their own work, for example, providing contacts for further international work.

Project processes

Timetable

There were some initial start-up problems, including delays in finalising contracts and administrative arrangements, and appointing staff. An added complication was the move of the project coordinator from Newcastle University to Hull University at the time when the project was due to begin. As a result, not all partners were able to begin work on time.

At various points unanticipated delays in completing tasks led to disruption to subsequent stages of the work. One of the national coordinators was promoted during the project to a more senior administrative role in his University, causing additional pressures on time, which could not be accommodated at short notice by additional staffing. These problems were largely overcome, by ingenuity and hard work, but such issues can be serious when project staff have complex other work commitments. As a result, an extension was negotiated to the contract timescale. In retrospect at least one partner felt that the time required to become familiar with the literature and policy context had been underestimated.

Partners would have liked a more generous time allocation for writing and dissemination at the end of the project. Although the project requirements were met, they felt that final documentation and materials generation could have been more extensive.

Management and team working

The project leader adopted a relatively devolved and participatory approach to project management, some were used to stronger central direction of transnational projects,

and took a little time to adapt. Some partners were new to this particular funding stream, and had to learn new processes.

The diversity of the team was welcomed. The project was enriched by a mix of people with very different academic disciplines, backgrounds, and personalities, from very different national contexts.

Four face to face meetings were held, and the partners agreed that the balance of face to face and online team meetings was appropriate, given the constraints of other work commitments and the travel budget. The decision to devolve the management of the face to face meetings to the relevant national partner led to some variation in effectiveness, and some felt that a more formal process might have been better, especially if it allowed more time for discussion of the content and ideas, as distinct from project management. However, overall, project staff felt that the sharing of ideas and materials had worked well. The introduction of monthly Skype meetings of the project team was particularly helpful in ensuring that the work was coordinated.

Partnerships

The project relied on a range of partner organisations to organise workshops. Although these had all signed letters of commitment at the proposal stage, some failed to take part. Partnership was vulnerable to changes of personnel. One National Employer network which had been actively involved in discussions for 2 months, then broke off communication without explanation.

Internal communication

The Italian partners set up a Moodle platform for internal communication between the project partners. This was based on an existing platform designed for course management, which did not easily fit the needs of this kind of project. As a result it was not as effective as hoped, although it was modified in response to feedback. Because some partners found it difficult to use they sometimes avoided communication or reverted to conventional emails for communication.

Resources

The project budget was adequate for the work, overall expenditure was in line with plans, and spent on legitimate project work. Minor modifications were approved through Newcastle University as the coordinating institution. Generally partners felt that there had been reasonable flexibility over the use of funding. For example, in one case money was redeployed from travel into translation costs.

Several projects reported that their home institutions did not provide adequate release of time for the work. In one case the project leader was undertaking three projects on top of a normal teaching load.

Translation

English was the agreed working language of the project, and all the national partners were fluent and comfortable speaking and writing in English. However, since most workshop participants, and the audiences for the materials, had little or no English, translation was inevitably an issue. To gather the evidence from partners required more translation of documents than allowed for in the budgets. Conversely, some materials generated by the project had to be translated before they could be used in

other countries. This caused extra work for the non-UK partners, and limited the scope for evaluation of the social partners' responses to the workshops.

It had originally been hoped that the evaluator would be able to assess the success of the workshops from feedback sheets. However, this proved unrealistic, since feedback was generated in the local language and it was agreed that it would be disproportionately expensive to translate all the material. The evaluator therefore had to depend on the summaries from the Project partners.

The costs of translation were underestimated in the original budget, and there were problems with translation throughout the project, although in at least one case, money saved by carrying out data analysis in house was redeployed to pay for translation.

One unplanned output from the project was the translation of documents for use nationally, including the EU's Active Ageing Agreement (March 2017) which had only been published in English.

Lessons learned

The final evaluation interviews with national partners identified a range of lessons for future projects of this sort:

- **Partner selection:** Identifying local partners needs to start very early, and it is important to maintain communication on progress, especially during the period between bidding and project start, when enthusiasm or understanding can wane, and personnel can change. It is also important to make expectations very clear. In at least one case an organisation which had willingly signed up to take part withdrew when it was made clear that their staff would not be funded for taking part in the workshops. It is important to involve a wide range of partners. Larger numbers and greater diversity would have been helpful in establishing findings and lessons for the future.
- **Definitions:** For projects of this kind, it is important to define “Active Ageing” more clearly from the beginning. There were misunderstandings which caused confusion about what was being discussed, and what sort of evidence required.
- **The health implications of an ageing workforce were underestimated,** and it is important in projects of ageing and work to give adequate attention to issues of health and of the changing nature of the labour market
- **Discussion of “content”:** It would be helpful to provide more time for discussion of the topics themselves. Meetings tended to be dominated by organisation and administration, rather than the underlying issues of ageing, industrial relations and social partnership. Some partners would have welcomed more time to talk beyond immediate project partners.
- **Project communication was significantly (and economically) helped by monthly Skype meetings** of the project partners
- **Transnational projects which aim to engage with social partners need to pay careful attention to language issues.** Research instruments, data and dissemination materials all need to be translated, and the costs are significant
- **Changing practice is likely to require “bottom up” strategies.** While national and European policy initiatives can create a context, practice is more often developed through face to face interaction between social partners, facilitated by experts. When this approach is adopted, employer and employee representatives typically recognise their mutual interests in addressing the issues.
- **Direct evaluation of impact on social partners is problematic** in transnational projects of this sort. Ideally, the evaluator would receive direct feedback on the project from the social partners, but this is difficult, since such material is generated in the local language, which the evaluator is unlikely to be able to

read confidently. Simple “check box” forms using the same format in all countries overcomes this difficulty, but at the expense of depth of evidence.

- **Timetabling needs to take account of holiday periods.** Summer holiday dates in particular are very different in different countries, which makes scheduling activity difficult between mid-June and mid-September

Annex 1 – Project Publications

Projects Summary Report	Christopher Ball
Consolidated Summary of the Project Reports	Matt Flynn
National Report and Summary for Italy	Paolo Tomassetti
National Report and Summary for Poland	Izabela Warwas, Justyna Wiktorowicz and Piotr Szukalski
National Report and Summary for Spain	Mariano Sánchez and Pilar Díaz
National Report and Summary for UK	Chris Ball and Matt Flynn
ASPIRE Workshop Summary (in English and Spanish)	
Workshop Findings for each country	
Evidence Report	

All these reports are online at <http://www.adapt.it/aspire/publications.html>

All other materials are online at https://www.agediversity.org/research_theme/social-partners/ (which includes the Italian, Polish and Spanish texts).

Annex 2 – Issues from the national reports

The national desk reports identified a great many issues relevant to research on age and industrial relations. Obtaining consistent and reliable answers to all of them across the project partners was not realistic during the project timescale. However, they do provide a useful list of topics of potential interest to future researchers.

Legislation

1. What age specific legislation is there that affects older people and work?
2. To what extent does legislation affect HR practice?

Policy

3. How far is policy devolved to local/regional level?
4. How well coordinated are national and local policies?
5. Is active ageing” policy seen as including aid work?
6. Is the “Active Ageing Index” used, and how does the country perform?
7. How well known is the Framework Agreement on Active Ageing?
8. How significant is migration as a policy issue, and how does it affect labour market policy?
9. Does public policy prioritise young people over older people (or vice versa)?

Institutions

10. What is the role of NGOs in the labour market or in relation to older workers?
11. What institutions exist to promote social dialogue?
12. What is the role of bilateral bodies?

Pensions

13. Can older people continue working while drawing a pension?
14. How far is pension contribution compulsory?
15. How are pension systems funded?
16. Are there incentives to defer drawing a pension – and do they work?

Unemployment

17. What is the level of unemployment, generally, in the range 50-65 and 65+?
18. What proportion are long term unemployed?
19. What is the impact of unemployment on pension status?
20. What support is there for unemployed older people to get back to work

HRM Practice

21. What sort of appraisal/performance review systems exist, and how do they apply to older people?
22. Are there apprenticeship schemes open to older people?
23. What kind of disputes procedures exist to resolve age discrimination issues?
24. Are there schemes to support healthier working for older workers?
25. Are there non-standard working models open to older workers?
26. In what circumstances can older people work after pension age?
27. Is there any form of seniority pay (where people are paid more on the basis of years of service rather than performance or job role)?

Collective bargaining

28. Does collective bargaining support insiders or outsiders?
29. Does collective bargaining happen at national or local level, at industry or company level?
30. How many people are covered by collective agreements?

Employees

31. What do we know about employee attitudes to work, and working later?
32. How far are employee attitudes likely to be affected by financial circumstances?
33. Do older workers from migrant backgrounds face distinct issues?
34. Are there special or distinct roles available to older workers?
35. How much inequality is there among the older workforce?

Trades Unions

36. How far is the workforce unionised?
37. What degree of recognition is there for unions in negotiation of employment policy for older people?
38. How far are Unions aware of ageing issues?
39. Are unions sympathetic to extending working life?
40. What role to unions play in education and training?

Qualifications and training

41. What role do formal qualifications play in the older labour market?
42. Are older people excluded from training, or is special training available?
43. How easy is it for older people to train to maintain skills or to retrain for new roles?

Employers

44. How aware are employers of ageing as an issue?

45. What is the mix of employer size in the economy – numbers of companies & number of employees?
46. Are employers facing skills or labour shortages?
47. Are there mechanisms for recognising employer good practice?
48. Is there any support available to employers to manage ageing issues?

Sectors

49. What is the overall sectoral mix of the economy?
50. How are older people represented by sector?

Projects

51. What specific projects have there been?
52. Are there any specific programmes or activities aimed at fostering intergenerational working?
53. How successful have they been, how well known and disseminated?

Research

54. What relevant research has been done on older labour market issues?