UK Country Report

iNGenBar – Inter-generational Bargaining
Towards integrated bargaining for younger and older workers
in EU countries

Dr Vanessa Beck
Dr Glynne Williams
School of Management, University of Leicester

iNGenBar – Inter-generational Bargaining – is financed by the European Commission, DG Employment, Social Affairs and Inclusion; Social Dialogue, Industrial Relations, Budget Heading 04.03.03.01, Industrial relations and social dialogue, VP/2013001. Subprogram II – improving expertise in the field of industrial relations. The Commission is not responsible for the content and author’s views in this report, nor for any use that may be made of the information it contains.
## Content

- **Introduction:** distribution vs. intergenerational conflict  
  p. 3
- **Trade Unions and the Industrial Relations System in the UK**  
  p. 7
- **Employment and Unemployment among younger and older workers**  
  p. 10
  - The situation for young unemployed  
    p. 13
  - The situation for older workers  
    p. 16
- **Introduction to the Case Studies**  
  p. 20
- **Case Study 1: Local Government, Hertfordshire County Council**  
  p. 22
  - Employer profile  
    p. 22
  - Addressing the needs of younger and older workers  
    p. 24
- **Case Study 2: Mid-Life Career Review and UnionLearn**  
  p. 26
  - Pilot project profile  
    p. 26
  - Addressing the needs of younger and older workers  
    p. 28
  - Relevance of project to unionism  
    p. 30
- **Case Study 3: Her Majesty’s Revenue and Customs (HMRC)**  
  p. 32
  - Employer profile  
    p. 32
  - The relevance (or lack thereof) of age to the career review process  
    p. 36
  - The potential of the review for ULRs and union representatives  
    p. 36
  - The possibilities and challenges for employment relations  
    p. 37
- **Policy recommendations**  
  p. 39
  - Conclusions to be drawn from the research findings  
    p. 39
  - Reflections on the concept  
    p. 41
  - Innovative directions and prospects  
    p. 42
- **Bibliography**  
  p. 43
**Introduction: distribution vs. intergenerational conflict**

Intergenerational bargaining must, in the UK, be understood as an implicit activity because, as will be outlined in the following, the coverage and scope of collective bargaining and social dialogue are limited. This is not to say that issues of age are irrelevant to union activities; on the contrary, there have been a number of union-led campaigns, though these have tended to focus on either older or younger workers. It is nevertheless important to discuss the specific circumstances of industrial relations and the labour market context in the UK to clarify the parameters within which an intergenerational dimension to bargaining might be possible. In so doing, this report will also consider how the relationship between the generations is currently presented and what an ‘intergenerational’ approach might comprise. Before presenting the case studies, the broader political, labour market and industrial relations context will be outlined, along with a brief discussion of how recent developments affect older and younger workers and the prospects for a more integrative inter-generational approach.

Recent discussion of intergenerational relations in the UK has focused principally on conflict or the possibility of conflict. Most prominently, this has involved the radical reappraisal of entitlements and services enjoyed by older age groups and the suggestion that resource transfer between generations - an essential prerequisite for economic sustainability and for social cohesion - has broken down. We do not propose to evaluate this specific debate here, but it is clear that such economic considerations can only be properly understood in conjunction with analysis at personal, social and, particularly political levels (Lüscher, 2011). Academic discussion of intergenerational issues has taken place in the field of family studies (Nilsen and Brannen, 2014, McDaniel and Zimmer, 2013), highlighting the transfer of resources and care that takes place between the generations. The labour market and workplace relations have not, until recently, been analysed from a generational perspective, but such public discussion as has taken place has tended to focus on the potential for competition and conflict. Yet the workplace is an arena where the generations meet as colleagues and often as equals, making this an area for voluntary, as opposed to family bound, intergenerational contacts. Workplace inter-generational relations thus reflect broader social trends, but can also be seen as the foundation for broader solidarity.

The absence of a discussion on social solidarity in the UK reflects a well-established neo-liberal political stance on distribution as one that should be left to ‘market forces’, as well as the limited scope of formal collective bargaining in UK industrial relations. Consistent with this political and ideological context, policy initiatives in the UK have tended to target the individual. For example, although the increasing focus on ‘employability’ - at both ends of the age spectrum - has parallels with other European countries, in the UK this is construed principally as a matter of individual ‘human capital’. This
individualisation and the withdrawal of collective provision can be seen *inter alia* in the abolishment of the default retirement age (DRA); deferral of state pension age (SPA); the introduction of Higher Education tuition fees; and the abolition of the Educational Maintenance Allowance (EMA) for 16-18 year olds. These changes are set within the context of post-recession austerity politics in which welfare and support provisions are squeezed, whilst job opportunities remain limited. Discussion of such policies has increasingly seen conflict over scarce jobs and scarce resources as inevitable, as “age cohorts fight for their own respective self-interests” (Emery, 2012, 8). And, indeed, the focus on self-interest, rather than social cohesion or negotiated distribution appears to make conflict more likely. The consistent portrayal of both younger and older age groups as a burden on society (see Phillipson, 1996) is accompanied by policies that emphasise individual responsibility and a reduced role for state welfare provision (Moore, 2006).

A focus on intergenerational conflict may be a self-fulfilling prophecy, since, by framing current younger workers’ prospects in terms of inequality between discrete, competing generations, current policy leads individuals to focus on their own immediate self-interest. As Beck and Quinn (2012) suggest, in the UK this may be a direct result of governmental austerity policies, because, in a struggle for adequate and affordable welfare for all generations, the vilification or rewarding of specific groups is often for political gain. In some cases the political agenda is transparent, such as Willetts’s (2010) argument that the ‘baby-boomers’ have treated national wealth as their own, rather than planning for their children’s needs: an argument premised on the idea that redistribution between cohorts has a) reduced and b) should take precedence over redistribution between rich and poor. Whatever the motivation, the outcome is conflict. Transfers between age groups are dynamic and responsive to social and economic priorities. Yet in times of economic stagnation, such transfers appear to be static and irreversible, leading to a Malthusian pessimism that focuses on conserving, rather than increasing, resources. One influential pressure group notes, for example, that “Unemployment is nothing new – but in the past it was cyclical” (IF, 2014). Employment security, housing, health care and pensions: rather than *rights* that define a civilised society, these all now feature as *costs* on the ‘Intergenerational Fairness Index’ (IF, 2013).

Whereas the ‘baby boomers’ were once cast as the victims of their time of birth, paying more to support their elders than they could possibly benefit (Johnson *et al.*, 1989), it is they who are now said to be gaining at the expense of their children. The use of the word ‘generation’ adds a sense that what is at issue here is the unambiguous and systematic impoverishment of one clearly-defined group by another. In fact, labels such as ‘baby boomer’ or ‘Generation X’ make little sense as objective empirical categories. As White (2013) points out, the difficulty of definition underlines the fact that ‘generations’ are interpretive
constructs. Mannheim (1952, 176) argued that “[m]ere contemporaneity becomes sociologically significant only when it also involves participation in the same historical and social circumstances.” The issue of communality is equally at issue when Vendramin (2010, 307) points out that to classify conflict as generational, two conditions need to be fulfilled:

“... on the one hand, the existence of an awareness among the younger generation of a common social situation, and on the other hand, that the divide between the generations is perceived as a structuring dimension of differentiated (and unfair) treatment”.

In other words, both ‘the young’ and ‘the old’ would need to be a generation ‘of itself’ and also ‘for itself’. This should encourage caution in the use of hyperbolic language, which may portray the changing relationship between age groups as a relatively fixed and unequal, one between distinct generations. Bargaining for different age groups is quite different from bargaining between opposing generations.

As Monaco (2010: 252) highlights in her comparative European analysis, “fragmentation among generations, in terms of weakness and strength, culture and expectation” creates an environment where these policy priorities – combatting youth unemployment and promoting active ageing – are in competition with one another, rather than complementary. The tendency for these decisions to be presented as distributive, zero-sum bargains was heightened by the recent recession. In 2009/early 2010 there was a short-lived public discussion of the benefits of extending working lives for older workers whilst youth unemployment was high: the underlying question was whether older workers should make way for younger cohorts. However, as the then head of the Trade Union Congress (TUC) Brendan Barber (quoted in TAEN, 2011, 4) pointed out, older workers “tend not to be doing the jobs young unemployed people might expect to get”. Similarly, Eichhorst et al., (2013, 18) have concluded that “despite a widespread belief in a lump of labour” (emphasis in original), “the early retirement of older workers is neither beneficial nor necessary to promote young people’s entry into the labour market”. An integrative, positive-sum approach to intergenerational bargaining would need to be based on such an analysis, recognising that attempts to improve prospects for the young need not be balanced against the removal (e.g. early retirement), or the side-lining (e.g. phased-out via part-time work) of older colleagues. Drawing on Vendramin’s (2010) definition of generational conflict (see above), intergenerational bargaining would thus require the awareness among the younger and the older generation of a common social situation and a belief that divisions between the generations can be overcome via collaborations involving trade unions.
In the abstract, this sounds like a sensible approach but, in reality, this makes the search for instances of (potential) intergenerational bargaining very difficult. Both older and younger workers have been affected by the current drive for ‘austerity’, not only in the UK, but across Europe. Whilst different age groups may face specific challenges, their common experience is more significant. A shrinking labour market, deregulation of employment, together with the continued attack on welfare spending has weakened the bargaining power of individual workers and of their unions. In this context, the notion of ‘intergenerational bargaining’ needs to be treated with a degree of caution. This is for three reasons.

First, the number of jobs is not a fixed, independent variable and the intergenerational ‘bargain’ is therefore not a zero-sum one. For example, encouraging older workers to retire does not, except in very specific circumstances, ‘free’ jobs for school-leavers. On the contrary, subsidising inactivity increases the tax ‘burden’ on the young. Second, to the extent that this can be thought of as a zero-sum game, it is one between workers, employers and governments, not between age groups. To construe this as an arena in which age groups are competing parties is unhelpful, just as it would be unhelpful to speak of trading benefits for men and women. There is certainly a valid question about how employment, pay and the quality of working life can be sustained and improved, but this is unlikely to be achieved by treating any current benefit as negotiable. Third, and because of this last point, trade unions have typically been wary of involvement in arrangements that effectively barter one set of concessions for another. ‘Flexicurity’-style deals, which trade labour market deregulation for limited transitional support to increase ‘employability’, are typically made from a position of union weakness, and, in times of greater strength, unions have understandably set their sights higher than this.

Nevertheless, this is increasingly how the interests of young and old are described, especially in the popular media. In particular, by presenting this as a matter of equality between generations, rather than one of fairness over the life-course (White, 2012), differential provision between age groups has been made more difficult. Taking a longer view, age-specific entitlements benefit everyone, but in the short term they can be portrayed as a pampered generation accruing benefits to itself and denying similar chances to the next. The old – or, to be precise, the baby-boomers – have ‘spent the inheritance’. But once it is conceded that this is fundamentally a battle for a fixed ‘pot’ of money, jobs, resources or services, then it becomes logical to see the task as one of arbitrating between warring ‘generations’ in order to reach a least-worst settlement. Intergenerational bargaining needs to be based on a more optimistic agenda than this.
To summarise, the following lists the impediments to ‘intergenerational bargaining’ in the UK context and serves as an indication of the sections that follow:

- Restricted scope of collective bargaining at the employer level
- Absence of bargaining at the sectoral level
- Low union density in the private sector, especially among young workers
- Employer and union focus on ‘here and now’
- Union scepticism of ‘flexicurity’ style trade-offs
- Age equality legislation makes ‘trade-offs’ between age groups difficult

**Trade Unions and the Industrial Relations System in the UK**

The scope for negotiation in the UK has been progressively restricted. MacKenzie and Martinez Lucio characterise this process as the ‘colonisation’ of the regulatory space once occupied by trade unions. This colonisation has involved parallel strategies aimed at excluding and stigmatising unions, while re-defining bargained outcomes in terms of the logic of the market (MacKenzie and Martinez Lucio, 2014; also Brown et al. 2000). These developments are key to understanding the decline of pluralism and the radically reduced role of collective bargaining in UK industrial relations. Union organisation has remained resilient and the seemingly inexorable decline since 1979 has slowed, in part due to union strategy and innovation (Simms et al. 2013a), but prospects for reversing decline appear distant (see fig 1). Although this decline in membership does not appear as catastrophic as in some other European countries, it poses serious limitations to union influence in a system where union power has been directly reliant on membership density.
Aggregate membership density is now 25.6%, but there are significant differences between sectors. In the public sector, density is now 55.4%, a decrease of almost 1% from the previous year (attributable to cuts to the unionised workforce). In the private sector, where membership was decimated in the 1980s, union membership has increased in line with the recent rise in employment, with density levelling-out at 14.4% (BIS, 2014). This latter figure masks large variations, notably according to size of workplace. Unions remain strongest in the previously nationalised energy and water industries, and weakest in industries characterised by high-turnover and low employment security, such as distribution and hotels/catering. Larger workplaces are more likely to be unionised and there are also large regional variations, with the probability of unionisation lowest in the South East of England (Blanchflower and Bryson, 2012). Women are now more likely than men to be a member of a trade union and membership is higher amongst older employees and those working in the professions (BIS, 2014).

In the context of 35 years of decline, these figures must be seen as reflecting the success of union organising efforts. Unions have specifically targeted groups that were previously under-represented, for example integrating women’s concerns into union agendas (Stuart et al., 2013) and creating the new role of equality representative to promote equality and fairness in the workplace (Bacon
and Hoque, 2013). These initiatives are both a response to a changing membership and a recognition that the profile of the workforce has changed. Equality issues are integral to union organising and union organisation is crucial to tackling inequality in the workplace.

Evidence suggests that this applies equally to inter-generational issues. Conflict between groups is less likely if the same representative body acts on behalf of all (Vendramin, 2010). The involvement of unions is therefore key because of their unifying effect. Union members are disproportionately older workers and unions have recognised the need to make themselves more relevant to young people (Waddington and Kerr, 2002; Williams and Quinn, 2013). Since the 1990s there has been recognition of young members as a distinct constituency with its own priorities. There is certainly a possibility that this degree of self-organisation will provide the basis for generational rivalry, but this is not evident to date. On the other hand, Vendramin finds very little evidence of union involvement in collective bargaining initiatives explicitly aimed at improving solidarity between age groups (2010, 314).

Although age equality at work is a trade union concern, the possibilities for an inter generational dimension to collective bargaining is limited by the conflictual nature of industrial relations and the weakness of unions in many parts of the economy. With this given context, we therefore find that “… there are very few targeted schemes trying to simultaneously promote the employment of young and older workers” (Eichhorst et al. 2013, 15). Our data also suggests that employers have taken a cautious approach to the legislation, interpreting the requirement of equal treatment as precluding targeted approaches to diversity management (cf ter Haar and Rönmar, 2014). This point is not specific to the UK: “Even when age diversity management is considered as an issue, most practices just focus on matters of knowledge transmission, rather than on the idea of age diversity as a resource and as an opportunity for mutual recognition between workers of different generations” (Monaco, 2010, 253).

Collective bargaining, in remaining areas of union strength, is typically focussed on pay and working conditions. Unions do, of course, pursue a far broader agenda but formal bargaining tends to be restricted to ‘bread and butter’ issues (Bacon and Hoque, 2012). Even here there is an unavoidable age dimension, for example in the form of discussions and industrial conflicts over pensions (Grady, 2013), though for obvious reasons the issue is presented as one affecting the entire workforce. Intergenerational equity is rarely an explicit concern of either employers or unions. During periods of concession bargaining, unions’ main priority has been the protection of existing members – and this has sometimes been accompanied by a worsening of conditions for new entrants. Examples of this are two-tier pay arrangements following outsourcing and the closure of relatively favourable defined benefit pension schemes to new recruits. Unions
have rarely been able to mobilise current members to defend the terms of conditions of the next generation.

**Employment and unemployment among younger and older workers**

Similar to most European countries, the UK’s workforce is ageing, and this has led to considerable concern about the dependency ratio, i.e. the proportion of those in work in relation to those who are retired. In the UK, the policy response has been to encourage and enforce the extension of working lives by abolishing the default retirement age (DRA) and extending the state pension age (SPA). Currently, the state pension can be drawn at 65 for men and 60 for women, though, for the latter, this has started to rise and will reach 65 by 2020. For both men and women, pension age will rise to 67 between 2034 and 2036, or possibly earlier, and to 68 between 2044 and 2046 (Eurofound 2012b). This is a top–down initiative to address fiscal (pension payments) problems, which may also ensure that there are sufficient numbers in the workforce. Whilst this may help to partially address financial problems, the consequences of this approach - including the training and development needs of older workers, their health and ability to continue undertaking their work, as well as the intergenerational tension this may create within the labour force given the high rates of youth unemployment – do not seem to have been considered. Any assessment of potential intergenerational activities will therefore need to address the needs of older workers to allow them to continue working and the requirements of younger workers to support them into the labour market. Before outlining the specific issues for each of these two groups separately, this section provides broader labour market developments in the UK with regards to employment, unemployment and economic inactivity. The statistics are broken down for the following age groups: younger workers aged 16-17 (initial entry into employment), 18-24 (entry and settling into initial employment), 50 to 64 (‘pre-retirement’), those aged 65+ (working past the ‘normal’ retirement age), and 16-64 (the labour force overall).

Following a prolonged recession, the UK has over the last two years seen employment growth. Comparing the first quarter of 2014 with the previous quarter, there has been increased employment and decreased unemployment as well as economic inactivity (ONS, 2014). Despite this growth, young people face high unemployment rates that have not recovered from large increases during the 2008/09 recessions. Young people’s (16/17 and 18-24 years of age) employment rate has decreased correspondingly whilst the employment rate for those aged 50 to 64 and that of those 65+ increased irrespective of recessionary pressures. Inactivity rates have increased for all groups, though far more for younger than older cohorts (see Graphs 1, 2 and 3 for overview of ONS statistics on employment, unemployment and economic inactivity by age).
Figure 2: Employment Rates (%) by Age Group

Figure 3: Unemployment Rates (%) by Age Group
This means that the pressure on older workers to remain in the labour market and retire later is showing slow but persistent results. In contrast, young people were already in a worse labour market position and have, in addition, been disproportionately affected by the recession. This can be seen as a result of employers’ responses to the recession that have favoured insiders over outsiders. For example, although unemployment increased, employers also found other means, such as re-skilling and reduced hours, to retain staff and avoid redundancy pay-outs (Beck, 2013; Warren forthcoming). It can be argued that this approach has favoured those in employment, including older workers, and disadvantages younger workers attempting to enter the labour market. According to Eichhorst et al. (2013, 3) in countries that saw an increase of activity rates of older workers (55-64) during the recession, “youth unemployment has tended to increase less than in other countries.” The employment situation for younger age groups in the UK has nevertheless been a major concern.

**Figure 4: Inactivity Rates (%) by Age Group**

Source for all graphs: ONS, 2014
The situation for young unemployed

Youth unemployment must be seen in terms of employer strategies. Keep (2012) has shown that both the quantity and the quality of jobs available to young workers in the UK are problematic. This contrasts with other countries where the working conditions of young people have been a priority (Gamwell, 2013). However, the main focus for policy has been on young people themselves. A key target group are those who are ‘NEET’: not in education, employment or training (Simms et al., 2013b) and the policy focus has been on the integration of these young people into the labour market. Although the ‘NEET’ category serves to identify a real concern, it is problematic. By prioritising labour ‘supply’, it tends to confound issues of education with those of employment, which are primarily limited by demand. And the creation of a separate category has made it possible for governments to massage youth unemployment figures by removing younger cohorts from these statistics. According to Eurofound (2012a: 24) a distinction needs to be made between the following groups, though they all tend to be counted towards NEETs rates:

• “[T]he conventionally unemployed” who should no longer be of compulsory schooling age and should be registered as unemployed. As the largest subgroup, a further differentiation between long-term and short-term unemployed should be possible.

• “[T]he unavailable” who have care and/or family responsibilities or who are unavailable to the labour market due to sickness or disability.

• “[T]he disengaged: those young people who are not seeking jobs or education and are not constrained from doing so by other obligations or incapacities, and takes in discouraged workers as well as other young people who are pursuing dangerous and asocial lifestyles”.

• “[T]he opportunity-seekers” are youths who are active and engaged but who are unlikely to take up the first offer of work or training they are offered because they are looking for specific opportunities “as befitting their skills and status”.

• “[T]he voluntary NEETs” are unlikely to label themselves as NEET because they are engaged in other activities that may include travelling, art, music and self-directed learning.

Given the breadth of this definition, the focus here is on NEETs but includes ‘older young’ cohorts up to the age of 24, i.e. those who could technically be categorised as unemployed but tend to be included in NEET statistics. The number of young people not in education, employment or training in England has been rising and this is especially the case for the older categories aged 18-24 years. A total of 13.3% of 16 to 24 year olds are NEET but the rates for 16 to 17 year olds are at their lowest since 2004 (Mirza-Davies, 2014). A report for
the TUC refers to current youth as a lost generation (Bivand, 2012). With public attention and media coverage on the plight of young unemployed individuals, the present government has been keen to be seen as proactive in this area. The overall direction and key policies initiated have been set out by publications such as Building Engagement, Building Futures (HM Government, 2011) and are summarised in the following paragraphs. Nominally, there have been considerable changes. Schemes and institutions established under the previous Labour government, included Foundation Learning, the New Deal for Young People (NDYP), the Educational Maintenance Allowance (EMA) and Education to Employment (E2E), were all abolished by the Coalition government. As Hutchinson, et al. (forthcoming) argue, however, there is little change in the overall direction and underlying principles of activities. The main problem may be that the re-labelling of services may have resulted in patchy support and may have lead to confusion as to what offers are available. This is heightened by the demise of Connexions, a national organisation which had a remit to provide independent advice and support to youths, and which had offices in most high streets. Without such a central agency, the range of support offers available may be confusing and/or difficult to access.

From 2013 onwards, the participation age has been raised. This means that young people are required to stay in education or training until they turn 17 (previously 16), with a further increase to 18-years of age to be instituted from 2015 onwards. The options that young people have include remaining in school, college or in home education; doing an apprenticeship; or participating in part-time education or training if they are employed, self-employed or volunteering full-time. This development seems to be in line with the influential Wolf Report (2012: 20) which observed that ‘employers value the skills learned in employment and the workplace, as well as those acquired in classrooms’ and that ‘many of today’s teenagers, like those of preceding generations, do not want to remain in academic programmes; they want to be in work, treated as (and earning like) adults, even though they may well return to study later.’ In reality, the options available to young people appear to be no broader as a result of these developments.

The Youth Contract was the Coalition government’s flagship policy on NEET and youth unemployment (DWP, 2012). On introducing the scheme, the Deputy Prime Minister described youth unemployment as ‘a ticking time bomb for the economy and our society as a whole’ (Clegg, 2012). Although the Youth Contract was rooted in the Department of Work and Pensions (DWP), it was an initiative of the office of the Deputy Prime Minister and operated cross-departmentally including involvement from the Department for Education (DfE) and the Department for Business, Innovation and Skills (BIS). The Youth Contract was launched in April 2012 with the promise of combining existing schemes with new ones. The Youth Contract measures consisted of:
• Apprenticeship Grant for Employers of 16-24 year olds,
• Work experience placements for 16-24 year olds who have been claiming JSA (Job Seekers Allowance) for at least 13 weeks,
• Support (payments of £2,200) for 16 and 17 year olds who are NEET, have low/no qualifications and are from disadvantaged backgrounds,
• Sector-based work academies offer a mixture of training, work experience, and a job interview at a local firm,
• Extra support at Jobcentre Plus means 18-24 year old JSA claimants have weekly rather than fortnightly signing on meetings,
• Funding for localised Youth Contracts in Leeds City Region, Liverpool and Newcastle who designed their own local schemes using national funding,
• Wage incentives for employers taking on a 18-24-year old on JSA for 6 months+. Enrolments for this scheme ended on 6 August 2014.

In addition, there are schemes including the Government’s main welfare-to-work programme, the Work Programme, a drive to increase apprenticeships, and mandatory work activities that NEETs or young unemployed individuals are referred to but that are not specifically aimed at this age group. Overall, the Youth Contract reflected the Coalition government’s focus on the supply side of the labour market. Their policies can thus be summarised as encouraging young people to stay in education and training, devolving financial responsibility for their learning to the individual and reviewing training provision to ensure it is focussed on employability. The scheme was seen to be an ‘abject failure’ (Pickard, 2014) with questions raised whether any of its aspects were innovative. The development of apprenticeships, direct support programmes, employer subsidies (Hamersma, 2008), work experience (Hollwood et al., 2012) and other forms of intermediate labour markets (Ali, 2011) were all instituted previously (cf Tonge, 1999). Although an initial evaluation of the wage incentive aspect of the Youth Contract has been undertaken (DWP, 2014a), reports on a fuller, independent evaluation are still outstanding. In July 2014 it was announced that the Youth Contract scheme was being wound up (Pickard, 2014). Uptake of the scheme was poor and in the first year only 4,690 youths completed their placements. Remaining funds are to be re-used for projects targeting, for example, youths in black and minority ethnic communities.

Given the continuing high numbers of NEETs (DfE, 2013; Mirza-Davies, 2014), the success of these NEET policies is questionable. The focus of the policies is on educational pathways, employment and training opportunities, which are an obvious ‘deficiency’ characteristic of this group (Nudzor, 2010). However, the issues that are associated with NEET status transcend individuals’ relationships with the labour and learning markets and are also related to wider aspects of their life such as their domestic and housing contexts (Cieslik and Simpson,
Analysis by Hutchinson, et al. (forthcoming) emphasises that NEET status is not primarily a problem of transition from school, but rather a more long-term problem about engagement with and attachment to learning and labour markets.

The situation for older workers

Faced with an ageing workforce, the UK has attempted to expand the numbers of older workers by limiting possibilities for taking early retirement, rather than by instituting incentives to remain in the labour market, as other European countries have done (Feifs et al., 2013). Pensions and disability benefits have been revised in order to make continued employment an economic necessity for most. This is in line with the recommendations of the 2007 Freud review, which advocated a reduction of dependency, and resulted in a general overhaul of the welfare system. Other factors, such as the availability of training, have not been addressed and employers’ behaviour and attitudes towards older workers do not seem to have adapted to demographic developments. Older workers continue to receive less education and training, especially in formal settings (see Beck, 2014).

Until 2014, the main focus of policies towards older workers was on extending working lives, a policy that explicitly intervened to change behaviours and ensure more people worked for longer (Weyman et al., 2012). Key concerns were the ratio of working to non-working years and the long-term fiscal unsustainability of early retirement. Although inactivity rates among 65+ year olds are still high, there has been a decrease and, correspondingly, an increase in employment rates over the last 10 years (see Figures 1 and 3 above). Unemployment remains an issue for older workers (Riach and Loretto, 2009), but the focus of government attention has been on the retention of existing workers in this age group, rather than the creation of new jobs. This targeting of effort is guided by the assessment that individuals aged 50+ who are made redundant are unlikely to work again. This approach, although fatalistic, is certainly consistent with the current employment, unemployment and economic inactivity rates (Figs. 1, 2 and 3 above). Beck (2013) also argues that older workers fared better in the most recent recession, partially due to employers’ needing their skills and partially due to their reluctance to pay out costly redundancy payments.

This employer behaviour was, from 2011 onwards, enforced by age equality legislation that prompted the removal of the default retirement age (DRA), meaning that there is now no set age at which individuals must retire. The retirement process has become a negotiated one and therefore heavily influenced by the existent employment relationship between employer and employee (Beck and Williams, forthcoming). These legislative changes were
presented as a response to a demographic shift - in particular, the ageing of the ‘baby boom’ generation (DWP, 2009) – but they were given additional impetus by the recession and the subsequent ‘austerity’ programme. From this point, retirement was no longer to be left to individual choice alone; it was to be enforced by increasing the state pension age, (Wood et al., 2010). This made a moot point of a key justification for abolishing the DRA: the policy emphasised the changed regulation as a progressive extension of choice based on individual rights. As early as 2008 Vickerstaff et al. had highlighted that there was a ‘limited desire’ to continue working. In particular, it seemed that there was a stratification in the occupational hierarchy. Professionals, who may have opportunities and choice, for example in the content and hours of work, would be more likely to delay retirement, but this is not the case for the majority (Vickerstaff, 2010), since those who most need a continuing income are also likely to have fewest options. Employers are unlikely to retain workers who are no longer considered useful, either due to out-dated skills or because of the physically demanding nature of their job. Thus, although the overall statistics show an increase in the number of workers in the 65-years and older group who might previously have retired, this is not necessarily a freely chosen option. Combined with the increase of the SPA, changes to pension schemes mean that there is concern about individuals’ financial ability to retire. A recent survey conducted by an investment company found that financial insecurity meant that around a fifth of respondents feared they would never retire, whilst a further 23% thought they would have to delay retirement by around ten years (BBC, 2014).

In June 2014 the government announced a new phase to its policies in response to the ageing of the workforce. Entitled ‘Fuller Working Lives’ (DWP, 2014b, c, d), the framework is an attempt to push even further the message that more people need to work for longer. The justification for the intensification of pressure on individuals is again provided with reference to the acute problems caused by the ageing of the population. The financial implications for individuals, employers and the public finance are highlighted, whilst suggesting that early withdrawal from employment could hinder economic growth:

Our modelling suggests that halving the employment gap between people aged 50-SPa and those in their 40s could have increased revenues from Income Tax and National Insurance by around 1 per cent (£3 billion in 2013)... (and) ... could have seen nominal GDP up to 1 per cent (£18 billion) higher in 2013. (DWP, 2014b, p. 3-4)

The report explicitly addresses the question whether increased employment of older people would limit options for young people and resoundingly rejects this assertion. The wording of this section seems to be aimed explicitly at public opinion, employers, key business leaders and employees, signifying that policy
makers are aware of public discussions on this subject matter. A number of issues are outlined to underpin the argument made (DWP, 2014b, p. 26-27):

- Drawing on the ‘lump of labour’ idea, a clear statement is made that whilst retirement can ‘free up’ jobs in a particular business, this has little effect on the macro level of the economy where this argument does not hold.

- Empirical evidence (Eichhorst et al., 2013 and Banks et al., 2008 are referenced) does not show any crowding out of younger individuals by older workers.

- On the contrary, there is evidence that increasing employment of older workers can lead to more opportunities for younger workers (see Kalwij et al., 2009).

- Historically, early retirement schemes to reduce overall unemployment have proven unsuccessful.

According to the government (DWP, 2014b) over half of the working population stop work before they reach state pension age (SPA). The targets for policy intervention thus seem to be those who are unemployed or inactive due to sickness, disability, or looking after a home or family as well as those who have retired ‘early’, i.e. before SPA becomes payable. In fact, the key reasons that older workers leave the labour market earlier than is deemed desirable are ill health, difficulties in returning to work after redundancy, caring responsibilities, financial circumstances and incentives to retire, and factors relating to the nature of work. This means that employment conditions, pay and the quality of working life become crucial to any attempts to extend working lives. These issues have already been highlighted as a central aspect of trade union work in the UK and are also key to the successful integration of younger workers into the labour market. The following table provides an indication of the number of individuals who fall within the main, targeted categories.

### Table 1: Labour market position of people aged 50 to SPA in 2013

<table>
<thead>
<tr>
<th>Category</th>
<th>Number</th>
<th>Rate</th>
<th>Unweighted base</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working</td>
<td>7,359,000</td>
<td>72%</td>
<td>50,065</td>
</tr>
<tr>
<td>Inactive (Sick or disabled)</td>
<td>1,042,000</td>
<td>10%</td>
<td>7,125</td>
</tr>
<tr>
<td>Inactive (retired)</td>
<td>704,000</td>
<td>7%</td>
<td>5,090</td>
</tr>
<tr>
<td>Inactive (looking after home or family)</td>
<td>418,000</td>
<td>4%</td>
<td>2,900</td>
</tr>
<tr>
<td>Unemployed</td>
<td>375,000</td>
<td>4%</td>
<td>2,460</td>
</tr>
<tr>
<td>Inactive (other)</td>
<td>330,000</td>
<td>3%</td>
<td>2,240</td>
</tr>
<tr>
<td>All</td>
<td>10,227,000</td>
<td>100%</td>
<td>69,880</td>
</tr>
</tbody>
</table>

Source: DWP, 2014d
Broad labels such as those used in Table 1 may disguise considerable variation but one key area to be explored is highlighted in the DWP Fuller Working Lives publications. Having caring responsibilities keeps around 4% of people aged between 50 and SPA from participating in the labour market. As Figure 5 shows, there is a clear increase in caring responsibilities with age, which is also reflected in the hours spent per week providing unpaid care. Both women and men are affected. Although the DWP’s (2014b) Fuller Working Lives strategy pledges support to working carers, it is not evident how extremely long hours of unpaid care could be either combined with employment and/or substituted by an already overstretched formal care system.

**Figure 5: Prevalence of informal caring responsibility by age, gender, and weekly time spent caring**

![Bar chart showing prevalence of informal caring responsibility by age, gender, and weekly time spent caring](source: Census 2011 - Office for National Statistics - Figures for England only)

Issues of caring, health and other reasons for being inactive are also important for other aspects of the government’s proposals regarding further extensions of working lives. The assumption is that people tend to feel forced out of work by circumstances beyond their control (DWP, 2014b), which is not an uncommon situation across Europe (Jensen and Øverbye, 2013). The DWP have made this assumption based on the information that out of the 2.5 million people aged between 50 and SPA, only 700,000 see themselves as fully retired but 1.7 million think they are unlikely to work again (DWP, 2014b, p. 28). To counter older workers leaving the labour market because of issues beyond their control, the solutions and actions suggested by the Fuller Working Lives approach are crucial. In response to the complex barriers to extending working lives, a wide range of measures is required. There is admission that we still do not know
enough about what works best and is most cost efficient. Recent government initiatives such as the Mid-Life Career Review (see case studies two and three) are explicitly mentioned as a means to enhance our knowledge and understanding of working for longer. More generally, the following measures are suggested (DWP, 2014b, p. 47):

- Health-focused measures such as preventative action for common work-related conditions, condition management and occupational health provision, flexible employment opportunities and job redesign/reassignment.
- Ensuring financial incentives inherent in the tax and benefit systems clearly make work pay and disincentives to remain in work are minimised.
- Promoting a dynamic labour market for older workers, widening access to work-based training, active career planning and effective back-to-work support.
- Support for working carers through care and carers’ support services, workplace support and flexibility, and assistive technology.
- Setting the right legislative framework and promoting positive attitudes towards older workers (both amongst employers and employees themselves).
- Ensuring people have an adequate understanding of the long-term financial implications of early retirement.

Whilst the Fuller Working Lives Agenda takes a broader view of the opportunities and barriers to extending working lives, there is no evidence of any fundamental shifts in the direction of government policy. As the new agenda has only recently been published, assessment of its reception and effectiveness remains outstanding.

**Introduction to the Case Studies**

It is clear that the specific needs of young and old members are important influences on the trade union agenda in the UK. This is not strictly *inter*-generational bargaining – the explicit attempt to connect, or balance, the effects of collective bargaining at both ends of the age range. But unions are nevertheless involved in policies and strategies that affect and benefit older and younger workers and, especially in the context of austerity, outcomes for different groups or constituencies are a consideration in bargaining, even if unions do not explicitly target both groups at the same time. In particular, and as highlighted above, the main focus of many of these activities lies on employment, pay and working conditions. Within this, the issue of training and
development, or learning more broadly, has emerged as central. This issue is relevant to both older workers, who need to maintain or upgrade their knowledge and skills to enable them to comply with the requirements for extending working lives, and for younger workers as part of a successful integration into the labour market.

All three of the UK case studies are located in the public sector and/or are government initiated pilot schemes that are currently being explored. There are good reasons for this emphasis. Given the focus on the work of trade unions with regards to older and younger workers, unionisation was essential in selecting case study organisations. With an average union density of 55.4% in 2013 (compared with 14.4% in the private sector: BIS, 2014), unions remain important in the public sector: 90% of public sector workplaces have a union presence and some form of formal collective bargaining arrangements remain in place for the majority of employees (van Wanrooy et al. 2013). As the ageing of the workforce triggered the discussion about intergenerational issues in the labour market, it is also important to select cases in which there are significant proportions of older workers. This allows an exploration of their recruitment and retention vis-à-vis that of younger workers. Public sector organisations – particularly in public administration and health – tend to employ a higher proportion of older workers than do private sector employers of comparable size (ONS, 2012b; Eurofound, 2012b). Finally, the public sector in the UK has been undergoing considerable restructuring as part of the ‘austerity’ measures introduced by the Coalition government. A significant number of the cuts in public spending were targeted at public sector institutions and resulted in considerable reductions in staffing numbers (see HMRC case study where staffing numbers will be almost halved over a ten year period). The government has therefore set itself the conflicting objectives of reducing public sector employment and extending working lives for older workers, whilst also increasing employment for younger workers, and is under particular pressure to introduce new or different schemes. The three case studies selected are thus part of central government’s activities to address age discrimination, extend working lives and promote learning for workers of all ages. More explicitly, Hertfordshire County Council has featured in good practice literature such as the ‘Age Positive’ propaganda campaign (DWP, 2013) and stood out for being one of only three employers in this publication who explicitly mentioned working with trade unions. The second and third case studies are interlinked. The mid-life career review is a pilot project, sponsored by the Department for Work and Pensions (DWP) and the Department for Business Innovation and Skills (BIS), which aims to provide older workers with an opportunity to review the barriers and opportunities for their career and, implicitly, their continuing employment. There was considerable discussion about who this review should be made available to: the ideal being that everybody should be entitled, whilst
practicalities dictated that reviews were initially targeted at those around the age of 50. The final case study, Her Majesty’s Revenue and Customs (HMRC) shows how the career review was implemented at an organisational level and developed further to benefit a broader (age-) range of workers.

**Case study 1: Local government - Hertfordshire County Council**

**Employer profile**

With over 2.4 million employees, local government is a major employer – and the largest employer in many localities. As well as providing services, local authorities are a significant source of good quality employment in areas where such jobs are rare. However, this is also an ageing workforce. Only 6% of local government (LG) employees are under 25 years old, compared with 17% in the private sector (LGA, 2011: 6). This is partly determined by the type of work performed – with very few roles for entrants who only have school-leaving qualifications – but this may also reflect the public image of local government. Unlike in the private sector, it is not possible to ‘grow’ jobs, and the current ‘austerity’ programme in the UK has underlined this point. This means that councils have been forced to address the ‘age diversity’ of their workforces in an attempt to recruit and retain skills.

**Figure 6: The impact of ‘austerity’ on local government staffing**

Employment in thousands

Source: Office for National Statistics
The county of Hertfordshire lies immediately to the north of London and has a population of 1.2 million. This is a growing and ageing population: an 18% rise in the overall population is expected by 2013 with a significant increase in the proportion of over-65s, currently standing at 16% (HCC, 2010). The demand for council services depends on the changing age profile, yet ‘austerity’ cuts make it more difficult to respond because most councils have found their spending powers curtailed. Equally, the county’s proximity to London means that it is competing for skills in a relatively high-wage market. The combination of high costs and reduced funding has sharpened the focus on efficiency.

19% of the council’s workforce are over the age of 50, compared with 27% of the local population in this age group. This is primarily a matter of retention, rather than of recruiting older workers. The council pre-empted the 2011 changes to retirement regulations by ending mandatory retirement in 2006. The 2011 changes are not expected to make a significant impact on the age profile since the length of working life in many of the council’s constituent services is determined by the nature of the work and by the rules of the various pension schemes involved. Fire fighters, for example, are typically unable to work beyond 55 (and proposed penalties on early retirement are unlikely to alter this: NI Assembly, 2013). Although the ending of the default retirement age creates uncertainty in succession planning, local government services include areas where working life is typically much shorter than the average. Three of the main services, teaching, policing and the fire service, make heavy demands on employees and early retirement is the norm. Again, fire fighters were mentioned as a prime example: “they all go at 55 if they can” (interview).

Young people are under-represented in HCC, with just 5% of the workforce of 31,000 under the age of 25 (HCC, 2013). Age profiles vary considerably between services and departments, but are not always related to length of service. For example, in Transport, Access and Safety services, where 20% of staff have been employed for less than one year, only 0.6% are under the age of 25. Wide age ranges are found in those services where employment has been deskilled or casualised. Libraries, with the highest proportion of older workers, also has a higher than average number of under 25s. As the DWP (2014b) notes, this suggests that there is no direct correlation between high employment rates of older workers and low recruitment of young people.

Although local government does not have the same freedom as the private sector to expand, it nevertheless suffers from the constraints of marketisation. Individual services and departments are treated as discrete cost centres and additional staffing costs have to be justified. Typically this means making a case for replacing individuals who are about to retire. In the case of senior employees, this is often a matter of nominating a deputy well in advance, so
that appropriate training and mentoring can be given. Whilst practical, this approach does raise questions about conformity with equal opportunities regulations. For other posts, the arrangement is a matter for negotiation between HR specialists and line managers, who are “encouraged” to hold career discussions. This is not a formal process and decisions are taken at the departmental level. There is thus the potential for very different approaches to the issue of age by individual managers, including very different experiences of entering and exiting employment.

The cost centre approach within the council is linked to the marketisation of services in the UK. Standardisation and centralisation of provision made it possible for employers to plan some years ahead, for example in the case of schooling or residential care for the elderly. The current quasi-market allows individuals some choice of provider and so generates uncertainty of demand. Overall, Herfordshire exemplifies the complexity of public management, being subject both to democratic accountability and to (quasi-)market unpredictability. The council’s approach has been to promote ‘flexibility’, but to do this with a degree of union involvement.

Addressing the needs of younger and older workers

The Local Government Pension Scheme allows for employees to continue in some form of employment while receiving a pension. It is thus common practice that:

...a member aged 55 or over who reduces the hours he [sic] works or the grade in which he [sic] is employed may request, with his [sic] employer’s consent, to receive payment of some or all of his [sic] benefits notwithstanding that he [sic] has not retired from employment. (GAD, 2013)

This opens up a range of possibilities for flexible and part-time work and is often considered a constructive way to gradually phase out older workers without an immediate loss of their skills or knowledge. The council states that its “guiding principle ... is that an employee should not have a bigger income as a result of receiving both a salary and a pension than they would have been paid had they remained in their original job”. The council, as administering authority, has discretion in this matter and set aside £4m for early retirement costs during 2014/15 (HCC, 2014b). The ‘flexible pension’ approach involves individuals choosing either to continue working part-time, or in a less senior role. More generally, requests for flexible working have increased and 94% of these have been accepted (DWP, 2013). The council sees this as one element in its
approach to skills transfer.

Because Hertfordshire abandoned compulsory retirement long before this became a legal requirement, its policies on managing older workers are probably more advanced than many comparable councils. Hertfordshire has a performance management system that involves annual appraisals. It claims that these apply to 100% of staff (as pay is linked to performance, there would be a penalty for non-participation). Since it is no longer possible for departmental managers to rely on retirement to solve problems of under-performance, performance management is now recognised as an essential mechanism. Line managers, who are responsible for appraisals, also have the task of discussing employees’ retirement plans. This can involve a delicate balance: in cases where older workers are deemed to be under-performing and rather than resorting to formal sanctions and dismissal, employees are encouraged to consider their options: “Do you not think you’d be better off leaving in a dignified way” (Interview). This performance-based approach impacts more severely on some groups than others: “If we have to dismiss people it tends to be in lower paid jobs. They are continuing working because they can’t afford not to” (Interview).

The trade union has taken on an unconventional role in these processes, acting as intermediary in cases where management might not be trusted by employees because of the sensitivity of the matter: the conversation “comes a lot better from the trade union. That’s when [the unions] have been really helpful” (interview). From a union perspective, this degree of incorporation into the process of human resource management is likely to be an uncomfortable one. It also highlights how both union and management have attempted to influence the way in which the new requirements are put into practice. Nevertheless, union weakness, combined with the squeeze on funding, appears to have resulted in an increase in management prerogative.

Given the obvious financial and organisational constraints on employment and career progression, there is little evidence that employees view age, or generation-identity, as a significant factor. A 2010 survey found that only 5% of older workers (>50) believed that ageist attitudes constituted a barrier. The under-30 age group were more likely to report ageism (23%), but a larger proportion (33%) thought that the main barrier was their own lack of experience (HCC, 2010). Recent initiatives have gone some way towards breaking down any institutional barriers to progression and, in the process, facilitating skills transfer. Managers are ‘encouraged’ to include discussion of future career aspirations in appraisals. For higher-skilled posts, the council encourages sideways moves and operates a ‘talent pool’. The aim is to assign a mentor for young recruits – for example a former apprentice or trainee – but this is dealt with locally and the role of HR does not extend to micromanaging such matters.
The early effects of such policies were encouraging, with a fall in turnover during 2009-10. However, this is likely to have been a reflection of labour market conditions; turnover has since increased to 13% (2014).

The link between the treatment of older and younger workers is not formalised. The council has a range of opportunities for apprentices and other trainees. No age restrictions are in place on recruitment, other than those specified in government funding rules. However, although the council claims a good track record on retention, there is no guarantee that an apprentice will have work when qualified. Job creation is a separate matter and needs to be justified by a ‘business case’. At a time of restricted finances, this often means linking recruitment with retirement.

To what extent is this a matter of ‘intergenerational bargaining? It is worth pointing out that the expression is not immediately intelligible, either to employers or union representatives: “What’s bargaining got to do with it” (interview). Nevertheless, all of the initiatives outlined here have been subject to negotiation, or at least consultation, with the unions. Some of the changes, for example the expanded role of performance management and the linking of pay to performance, might, in previous times, have been the subject of dispute. In this case, these proposals came at a time when large numbers of redundancies were being made in local authorities nationwide. So, asked why agreement was so easy in this case, the council’s answer is straightforward: “the other options were worse”. This statement illustrates the way in which the post-2008 cuts have influenced workplace industrial relations. For public sector employers, options have been limited and, for trade unions, bargaining has often been a matter of damage limitation. Nevertheless, without even this limited form of bargaining at HCC, employment, pay and working conditions may indeed have deteriorated significantly.

**Case study 2: Mid-Life Career Review and UnionLearn**

**Pilot project profile**

Driven by an attempt at fiscal savings via the reduction of pension payments, the government (Department for Business, Innovation and Skills, BIS) has invested in the Mid-Life Career Review to encourage prolonged working lives. Although the rhetoric underpinning the launch of the pilot project emphasised individual choice and equality, government representatives also made it very clear that financial issues are the key driver. The Minister of State for Work and Pensions, Steve Webb, at the mid-life career review conference in April 2014 reinforced this message by warning that “catastrophically early” exits from the
labour market had to be prevented by extending working lives by about a year before letting individuals experience “something like retirement” (personal notes). The Mid-Life Career Review is intended to be an opportunity for people who are in their late 40s/early 50s to take stock, review their options and plan for the future. It should help to:

• manage their careers in later life,
• find further relevant information,
• develop an action plan,
• take the opportunity to assess their priorities,
• address the life issues they are facing (NIACE, 2014).

These aims are of direct relevance to the trade union agenda - healthy employment, pay and working conditions and equality - but they also contribute to the ‘Fuller Working Lives’ advocated by recent government initiatives (DWP, 2014b). The project was initiated and led by NIACE (The National Institute for Adult Continuing Education), an independent charity which promotes adult learning across England and Wales and which undertakes research, development, publications, events, outreach and advocacy activities. The pilot project was undertaken between March 2013 and March 2014. A subsequent continuation and evaluation project has since been agreed with DWP and BIS. The work undertaken to date involved 17 pilot partners delivering mid-life career reviews to over 3000 clients. The partners consisted of National Careers Service (NCS) providers; learning providers; voluntary organisations; workplace learning advocates; union learning reps and community learning champions (NIACE, 2014). Although the Mid-Life Career Review project is specifically targeted at older workers, research findings pointed to broader usage and potential benefits. Beneficiaries of Mid-Life Career Reviews as well as the individuals and organisations providing the reviews highlighted that the reviews had allowed them to look at the bigger picture of career developments and the range of individual and social factors that influence whether and how an individual can participate in employment. This, again, tallies well with the more holistic view of extending working lives exemplified in the Fuller Working Lives literature (DWP, 2014b). The following quote shows that these conversations were considered to be useful not merely for older workers.

‘We’ve learnt from it, we’re extrapolating good practice. It is something I think is an invaluable thing to be able to offer customers. And I don’t just think for 45 plus. People get stuck in ruts at 30. They get tagged at 25 even. I think it’s a great tool and opportunity to offer.’ (NCS Manager)
Addressing the needs of younger and older workers

The opportunities to expand this approach beyond the age group initially targeted were discussed with representatives from UnionLearn, one of the biggest partners in the project. Union Learn was established by the TUC to assist unions in the delivery of learning opportunities for their members as well as managing the Union Learning Fund (ULF) (www.unionlearn.org.uk). Since the inception of the ULF in 1998, £121m has been spent on innovative union projects that help trade union members into learning. An independent evaluation of UnionLearn and the ULF in 2010 concluded positively and recommended “continued support for ULF and unionlearn; the need to embed union learning more centrally in the adult learning and skills policy agenda; and that unionlearn develop its strategic capacity” (UnionLearn, 2010). UnionLearn already provides a range of advice to both older workers (UnionLearn, 2012a) and younger workers (UnionLearn, 2012c) and are therefore in a good position to take a strategic view on issues of youth unemployment and the ageing of the labour force as well as the importance of learning for workers at either end of the spectrum.

Unions and learning opportunities thus play an important role in helping younger workers transition into, and settle within, the labour market. Apprenticeships and vocational education more broadly are important, especially for younger workers under the age of 25 who take up fifty six percent of all apprenticeships (Gamwell, 2013). Given that training provided by employers is in decline (UKCES, 2013) and only 15 per cent of businesses offer apprenticeships (Gamwell, 2013), the role of organisations such as UnionLearn is becoming more important. “Within the UK the chances of young people being long term unemployed are substantially increased by a lack of qualification.” (...) “UKCES (2012) identified that around 9% of young people entered employment where no training was provided. For young workers in micro organisations, in particular those with 2-4 employees this figure was 22%. In the construction sector it was 14%” (Gamwell, 2013).

For older workers, issues of skill development, maintenance of employability and general learning are equally important (Beck, 2014). A further issue to consider with regards to the ageing of society is that some sectors (noticeably engineering) are already struggling to recruit or retain younger workers, especially for jobs where extensive training and learning are required (i.e. the possible starting age for these jobs is quite high). In these sectors and jobs, employers and workers need to ensure that skill development is offered and that learning and business strategies are incorporated (Tynjälä, 2008). Employers play an important role here as it has been shown that they tend to juxtapose older workers versus younger workers as well as skills and qualifications versus
experience and tacit knowledge (Beck, 2014). It is therefore an important aspect of working with an age-diverse workforce to encourage employers to take a more proactive and considered stance on what learning and training is made available to which specific groups of workers and how informal learning, for example, is evaluated and acknowledged (see Paloniemi, 2006).

As part of the Mid-Life Career Review project, UnionLearn undertook more than 770 Mid-Life Career Reviews. These were undertaken mainly by Union Learning Representatives (ULRs), but also workplace learning advocates1 and some National Careers Service2 representatives. This allowed for a multi-organisation and multi-union approach. ULRs are uniquely placed to undertake these reviews because they know the workplace and often the staff, which lead to open and frank discussions as part of the review – though this led to some questions about confidentiality and follow-up support after having opened up this Pandora’s box of possibilities to individual workers. The role of ULRs becomes even more crucial as they remain within the organisation and are likely to continue the conversations, even if this is not always within a formal setting.

In an interview with a supporting learners development officer and a service manager, they were able to reflect on the lessons they had learnt from these activities and how they might be implemented. A key issue to emerge was the importance to consider the bigger picture of individuals’ lives, not merely their employment career. NIACE (2014; and interview with the service manager responsible for the Mid-Life Career Review project) reported that participants in the Mid-Life Career Review discussed training, learning opportunities, general career developments, volunteering and self-employment but also finances, health, retirement options and caring responsibilities. UnionLearn found, however, that in conversations held as part of the Mid-Life Career Review, the focus was mainly on work and neglected issues of life development and continuous improvement, stress, health and wellbeing, finances and other social commitments including care (for both children and older relatives). There was further divergence between workplaces in terms of which of these aspects was more of an issue and the interventions and learning opportunities offered as a result of the reviews varied considerably. Consequently, UnionLearn changed the title of the activity to Mid-Life Development Review, to include personal development. In practice, the term utilised was ‘development review’ or ‘career review’, which meant that the age-restrictive term was transformed into one that became applicable to a much broader group. This also allowed a broader consideration of (employability and) transferable skills outside of those directly relevant to the specific job currently being undertaken. A key resource that UnionLearn utilises for here is Hopson and Scally’s (2008) *The Rainbow Years*,

---

1 These individuals hold similar roles to ULRs but are not part of the trade union movement.
2 See: https://nationalcareersservice.direct.gov.uk/Pages/Home.aspx
the pluses of being 50+, as this is a practical text to help ULRs and individual workers reflect. The transferable skills card provided in this book were especially useful tools for individuals who were unemployed or in danger of being made redundant as they helped them to reflect on their employability.

Although not all of the above mentioned activities were directly supported by the BIS funded Mid-Life Career Review project, the model developed was one that had partially been in place and was a best fit for the trade union movement. It was clear that the project worked best where the learning infrastructure was already in place, i.e. where there were: trained ULRs in the workplace, a learning agreement, ULRs had facility time or paid release to conduct reviews and follow up work, a learning committee, a union learning centre with resources and backup and, crucially, employer support. This shows that issues raised during the review are a core part of the ULR role. The focus is therefore now on up-scaling the operation, in particular by rolling the model out across all union teams and across all regions, especially those that have been supported by the UnionLearn Fund (ULF). This will be easier with big unions (e.g. Unison are already engaged) and large employers (e.g. NHS or Rolls Royce where the learning infrastructure is in place) but also smaller, sectoral unions who have already considered their older workers as part of ULF projects (e.g. Britannia Staff Union). The model does not work as well in SMEs where there is no infrastructure in place and a lower level of unionisation. The size of organisations may also be relevant to the retention of older workers but less likely to influence the recruitment of younger workers via schemes such as apprenticeships (BIS, 2013).

Relevance of pilot project to unionism

There are a number of benefits that UnionLearn gained from participation in the project. First, it helped them focus on age and in particular the older age group. The target of looking at 50+ is useful because this is thought to be a time for natural reflection. However, for some professions the mid-life point of their career might be located much earlier. The examples mentioned were fire fighters, professional footballers and carers with very heavy physical demands. A small but significant group who came forward for the reviews are individuals younger than 40 whose self-perception placed them as being mid career and in need of development. Incidentally, since the completion of Mid-Life Career Review project, the NCS has taken older workers off its priority list, partially as a result of new governmental contracts and funding arrangements. They now tend to focus more on the unemployed and especially younger workers. Whilst this could be a way to utilise the lessons learnt from the project for younger people, there is also the problem that those (older workers) in work who need to up-skill
or who face the threat of redundancy will not be able to receive support. This re-focusing on initial training ignores the understanding that it is easier to retain older workers rather than having to reintegrate them into the labour market after a period of unemployment. A related problem is that comparatively small numbers of workplaces in the UK have apprentices, with the majority recruiting into employment that has little or no structured training. In particular, workplaces that require higher skill levels tend to have fewer younger workers. This might mean that ULRs would have less opportunity to include young workers in the review process.

Second, the pilot project has made resources available to unions which will facilitate a broader range of activities, especially given the current economic climate (see for example in the third case study the role of PCS at HMRC whilst undergoing restructuring and redundancies) and looking at transferable skills. This is allowing UnionLearn to develop a new Supporting Learners strategy, aimed at providing information, advice and guidance to workers of all ages. A key tool via which UnionLearn and Learning Reps within organisations delivers its resources is the ‘Climbing Frame’, which is used to:

- provide up to date information to help during discussions with learners,
- update ULRs knowledge about various learning opportunities,
- develop individual action plans with learners,
- keep records of sessions with learners,
- store local information and contacts,
- gather information about learner profiles to support negotiations with employers.

“The Climbing Frame recognises that union learners have aspirations, experiences and skills which relate to all aspects of their lives: their current jobs, possible career routes and personal situations. This website has been designed to help ULRs effectively carry out their role in supporting union learners and help bring learning into the workplace.” (www.climbingframe.unionlearn.org.uk). Following the 2006 Leitch review which identified serious skill shortcomings in the UK labour force, UnionLearn considers bargaining on skills and learning issues to be key not only to the trade union movement but also for future employment of individual members (UnionLearn, 2012b). The Climbing Frame now has a specific mid-life review learning theme, which includes specific resources, information and links to other relevant organisations.

The positive feedback from the pilot project led UnionLearn interviewees to
conclude that they are in a strong position to campaign for a right to a ‘mid-life’ review and for this to be extended to members of all ages. However, there are a number of challenges and problems with this:

- UnionLearn has had its funding reduced and may be under pressure to consolidate its effort on existing successes.

- Up-scaling may be problematic. Where ULRs are in place, this infrastructure model is very powerful and cost-effective, but it needs to be understood as adding to, rather than substituting for, existing provision. In particular, employers may misunderstand the review as getting a service on the cheap.

- ULRs are volunteers who need to be engaged early in the process, since their effort cannot be taken for granted. ULRs are the linchpin in bringing younger and older workers together within a workplace and, without their involvement, the ‘development review’ is no more than an individual process.

- There was a huge demand for the career review once members heard about them. If this could be replicated across the board, it is questionable whether demand could be met.

Case study 3: Her Majesty’s Revenue and Customs (HMRC)

In the previous case study, the national pilot project called the ‘Mid-Life Career Review’ outlined the national project and discussed the possibilities for up-scaling and main-streaming this approach. The third case study of HMRC is linked to the previous discussion in that this is a workplace where the Mid-Life Career Review was implemented via Union Learning Representatives (ULRs). Considering the organisational level shows that the aspiration of making the review available across the age range and extending its use beyond the pilot project stage has already been put into practice. A tool designed for a particular age group with particular needs has been developed into a mechanism relevant to the whole workforce.

Employer profile

HMRC constitutes a non-ministerial department of the UK government that was formed by a 2005 merger of the then Inland Revenue and Her Majesty’s Customs and Excise. Reasons for this merger include a focus on efficiency savings in the form of a reduction of 3,200 full time equivalent posts (Shah et al., 2010). HMRC has since been responsible for the administration and
collection of all taxes as well as some related activities such as tax based benefits and the enforcement of the minimum wage. Much of the service provided is thus to ensure that individuals and companies are charged the right amount of tax and to this end, 79 million telephone calls were made to HMRC in the year from 2011 to 2012 (House of Commons, 2013). The dedicated call centre staff that deal with these calls were already struggling to meet the demand of a vast number of, often complex, queries. Carter et al. (2011) outline that there were then further efficiency targets in the HMRC Pacesetter programme, which included a reduction of 16,000 jobs by 2008. HMRC are also said to be planning to reduce the number of customer-facing staff by up to a third, that is about 8,500, by 2015 (House of Commons, 2013). These staff cuts come at a time when, with the introduction of new benefits such as the universal credit and changes in the child benefit system, the need for a dedicated service to clarify appropriate taxation levels is likely to increase. These developments have been given new impetus by the post-recession austerity programme, but also need to be seen in the context of attacks on the civil service over a much longer period (Curtis, 2010; Fairbrother et al. 2011). Overall, from formation in 2005 to the end of 2015, HMRC will have almost halved its staffing levels from 97,000 to 55,000 (ARC, 2013). With this history of cuts and a focus on performance outcomes, it is not surprising that HMRC has been the site for research into ‘lean’ working (Carter et al., 2011) and is a workplace in which issues of workforce ageing are likely to be prominent.

HMRC won the 2013 Employer’s Network for Equality and Inclusion Award for Managing an Ageing Workforce. The award recognised the increase of older workers in HMRC, highlighting the use of partial retirement (involving 7.1% of staff: ENEI, 2013). As we demonstrate below, however, this figure tells only half of the story and needs to be understood in the context of the continuing programme of staffing cuts. HMRC (2011) publishes information demonstrating its compliance with the Equality Act of 2010, showing that the largest proportion of staff (40%) are in the 44-54 age range. Almost 5% are over 61, but only 1% are in the youngest 16-21-year old category. This age distribution is explained by an external recruitment freeze and the relatively long working lives of the majority.

We are looking critically at all our recruitment processes to ensure that they do not disadvantage younger or older applicants, but the external recruitment freeze means there is little likelihood of making any significant impact on our age profile in the next 12 months. (HMRC, 2011, p. 4)

The impact of this freeze, and the impact of the cuts more generally, is felt both by the individual worker and by the organisation as a whole. Senior managers
have argued that the erosion of pay, pensions and conditions has resulted in the loss of expertise to the private sector, further limiting HMRC’s ability to tackle corporate tax avoidance (ARC, 2013). It takes between two and four years to train a tax professional, so the loss of senior staff, coupled with an erratic recruitment policy, makes it difficult for managers to plan ahead (HMRC, 2011). Over half of the workforce is over 45 and 18% over 55. 30% of senior grades are above 55 years of age.

The overwork caused for remaining staff, coupled with specific attempts to routinise and intensify the work process, have clear health consequences, as Carter et al. (2013a) demonstrate in their study of how the ‘lean production’ model was implemented. Attempts to deploy staff flexibly meant that specialist skills to deal with complex issues are not necessarily available when required (House of Commons, 2013). Whilst the Minister for the Cabinet Office, Francis Maude, explicitly mentions HMRC staff and their dedication to improve performance as part of the introduction to the Civil Service Reform Plan (HM Government, 2012), staff and line managers have a different view. Task discretion has been curtailed, processes fragmented, jobs became less interesting and staff morale in general has worsened (Carter et al., 2011). It is therefore not surprising that the service delivered to customers has suffered (see House of Commons, 2013). A key question for Carter et al. (2012) is why there was no effective union resistance to these changes or action to soften their impact.

The Public and Commercial Service Union (PCS) represents a large proportion of HMRC staff: between 55,000 (PCS, 2012a) and 60,000 individuals, constituting a union density within some sections of HMRC of 80% (Carter et al., 2012). Two hundred HMRC offices have been closed since 2009 and there are plans for a further seventeen offices to be shut in 2014/15 (PCS, 2012a). Within this spending period, staff numbers were to be reduced by 10,000. PCS has consistently opposed such cuts and members have supported industrial action, not only to planned loss of jobs, but also cuts to pay and pensions. PCS has pointed out that staff cuts do not make economic sense whilst tax avoidance is thought to be in the region of £25bn. This issue was brought to public attention when HMRC was found to have utilised anti-terrorist legislation to pursue an in-house lawyer who had exposed a ‘sweetheart’ deal with Goldman Sachs, which let the company off paying £10m in interest (Syal, 2014).

HMRC’s response to PCS industrial action, including a ban on overtime, was to recruit staff on fixed-term appointments (FTAs) to deal with the backlog of work (Carter et al., 2012) as well as contracting some work to private sector providers (PCS, 2012b). The appointment of FTAs has been significant because their treatment has been utilised to galvanise union action amongst both younger and
older workers affected. Following further restructuring and cuts, FTAs themselves were being targeted for redundancies: out of 56,000 staff, 11,000 FTAs were to be ‘lost’ over the next year. With the loss of jobs and employment conditions, moral and engagement amongst the workforce has declined (ARC, 2013). Whilst the appointment of FTAs could have been seen as undermining the employment security and conditions for all staff, the length of many appointments meant that ‘temporary’ workers were seen as colleagues and fellow union members.

The career review is now being used to explore such contractual differences. Management within HMRC had agreed to the Mid-Life Career Reviews being undertaken because it tied in with training promises in general and two specific agendas. First, within the context of the intense focus on performance and efficiency within HMRC, the career review could be sold as a preparation for performance appraisal conversations. The career review allows for a safe conversation with a peer that can highlight issues that staff would like to talk to their managers about, in particular with regards to participating in development and training programmes. Second, the career review complemented HMRC’s existing agenda on health and well-being at work.

Out of these two agendas, the former was especially important because of the stronger enforcement of performance management and the persistent threat of redundancies. Within the HMRC performance management structure the proportion of employees who are on ‘must improve’ status as a result of appraisals has increased from approximately 2.5% to 10%. This group of workers is in danger of being ‘managed out’ if their performance does not improve. The career review allows people to consider developments at work and evaluate their options, both within the organisation and outside it. Given the industrial action as well as the on-going restructuring occurring within HMRC, such a reflective process could be powerful, both for the individual and for the workforce as a whole.

> Until you start asking people, you don’t know what you’re going to find out and that’s why we’ve been a bit wary of doing it in big groups. We’re almost working one-on-one because you might be opening cans of worms.

(Interview ULR)

During the research process, three significant issues emerged: the relevance (or lack thereof) of age to the career review process; the potential benefit of the review for ULRs and unions more broadly; and the possibilities and challenges of the career review for employment relations within the workplace.
The relevance (or lack thereof) of age to the career review process

As was suggested in the overall case study on the Mid-Life Career Review, UnionLearn had taken a pragmatic approach to the age requirements and was using the review process for workers at very different stages in their career. During the interviews conducted at HMRC it emerged that the youngest person who had taken part in a career review was a 21-year old who had used the opportunity to discuss ways in which to gain employment security by making her current FTA employment contract permanent. It was an important part of the discussions that the contributions that shop stewards and ULRs could make via the career reviews could be made irrespective of age.

*The age - that’s where we’re taking it in a different direction. The career doesn’t need reviewing because of a particular age. The career needs reviewing because the career might change.*

*It doesn’t matter whether "Bob" is sat next to a 21-year old or a 64-year old. We’re all doing the same job and the way that is going to change is going to change regardless of your age, isn’t it?*

(Interview, ULRs)

Old and young are expected to do the same work, but contractual obligations may not be age-neutral. Discussions about converting temporary to permanent contracts demonstrated a clear age dimension. A total of 80 permanent jobs had recently been advertised internally to replace around 200 temporary staff but the specified working hours for these permanent staff were 12-8pm. Respondents saw this as prohibitive to older workers who may have care responsibilities (though this may also apply to younger workers). Incidentally, the working hours of the new jobs are likely to be prohibitive to all staff as there is no reliable public transport to the workplace and the site’s car park closes at 7pm.

The potential of the review for ULRs and union representatives

The career review has become an important tool for ULRs and union representatives to undertake their work because it allows them additional time and freedom to have conversations with members. ULRs have a statutory right to ‘reasonable’ time off, for example to promote learning and to discuss training needs. The ULR role is separate from the role of workplace steward and these discussions are not typically seen to be union consultations. The difficulties experienced in undertaking ‘official’ union work was noticeable in the research
process, where it was made clear how difficult it was for respondents to get time away from their workplace to talk to us. Under the auspices of a management sanctioned career review process that may also include some aspects that benefit the company, in-depth conversations between workers become much easier. Our discussions revealed that ULRs and union stewards had experimented with the career review process, usually on each other, and had decided to extend this to the membership. The one-to-one conversations are a vehicle to discuss not only developmental but also, as mentioned above, contractual issues. They also allowed for broader discussions of the options available to workers.

...we have all sorts of weird and wonderful backgrounds and you don’t always know what people want to do and its nice to have these kinds of conversations.

People will open up to peers if they feel safe.

(Interview ULRs)

The potential of the person-centred career review was contrasted with the training and development work that ULRs in this workplace used to undertake. In the main, this used to consist of discussing a list of training opportunities that was available and attempting to persuade workers to participate. Responsiveness tended to be low, because it was not always clear how relevant the activities were to the individual. This process is now reversed. Following the career review conversation, specific and appropriate opportunities can be explored and once found, follow up conversations are held to support the individual workers’ development and training.

To me, it’s probably the best tool that ULRs have ever been given to do the job. [...] They [the worker] might decide to completely change.

So the reason we are carrying on with it [the review even though the government pilot has ended] is because it allows us to do our job better if you will. It makes it easier.

(Interview ULRs)

The possibilities and challenges of the career review for employment relations

In addition to significantly strengthening the role of ULRs, potentially even giving them a strategic position within the workplace, respondents were very clear that the career reviews had significant benefits. Career reviews, initially designed to
prompt a particular age group to re-think training and development opportunities, have a much broader relevance. Issues that might initially appear to be individual in nature often have a collective, employment relations dimension, as in the case of progression from fixed-term to permanent contract. Learning and development are themselves significant issues in a country in which skill development remains problematic. But respondents went beyond this and suggested that the reviews were a way to rebuild a positive employment relationship, motivate staff and provide them with better work-life balance.

*If you’ve got this properly embedded and people started thinking about themselves and what their potential is, and if people are allowed to develop what they’re naturally good at, you are going to get happier people who are more committed. You get more than that back in loyalty and commitment. It gives people more control over their lives.* (Interview ULR)

This is a very clear message about the potential benefits of the career review. However, discussions also revealed that there were possibly dangers in the review process. ULRs and union reps reported that there were negative responses to the attempts to institute reviews. One reported having been asked what qualifications they had to fulfill this role. Above all, however, there was discomfort that the career review could be misused by management and that the individuals undertaking the reviews with workers were ‘doing management’s work for them’. This was strongly rejected by respondents.

*With all due respect, this is not a management role. Management’s role is to pick up people’s development needs, we’re helping people identify those development needs. That is not a management role. That is a peer-to-peer kind of thing.*

(Interview ULR)

There was a strong feeling that the career review was an important part of what UnionLearn, in particular, but also the union movement more broadly was all about. One respondent recalled that when UnionLearn was first created, management was sceptical about committing time and resources to the upskilling of their workforce. To the question ‘what if I train people and they leave’ the UnionLearn response was ‘what if you don’t train people and they stay’. However, there was also a clear awareness that the career review was helping management undertake some aspects of their job.

*They don’t have the money to employ consultants, so we’re the cheap option, really, aren’t we.*
The importance of the career review process is highlighted by the ongoing industrial disputes at HMRC. Since undertaking this research PCS members in HMRC have been continuing their industrial action to challenge HMRC management on issues relating to: performance management reviews; mass job cuts; office closures; privatisation in benefits and post rooms; FTA redundancies; and flexible resourcing (SP, 2014). Whilst these strikes signify that the aspects of the career review that benefit management have not led to any significant improvement of the relationship with the union or the employment relationship within HMRC in general, the continuing insecurity over jobs and working conditions makes the opportunity for a reflective conversation all the more valuable for individual workers.

Policy recommendations

This report began by drawing attention to some of the conceptual difficulties and the political implications inherent in discussions of inter-generational (un)fairness. We have suggested that the absence of explicit attempts to balance, or trade, benefits for old and young in the UK is, in part, explained by the shrinking boundaries of collective bargaining, but is also consistent with a union approach that is oppositional, employer-specific and aims to secure additional benefits, rather than arbitrate in the distribution of existing ones. We have also suggested that, although the social partners have been resistant to forms of bargaining that attempt to trade-off benefits for different age groups, a clear age dimension exists in many recent initiatives. In fact, as our final case study demonstrates, unions have rejected the idea of treating ‘generations’ separately, in favour of a more flexible approach that aims for fairness for all ages.

Conclusions to be drawn from the research findings

The UK has seen a broad range of policy developments targeted at younger and older workers. A number of schemes such as the Youth Contract to provide apprenticeship grants, work experience placements, financial support and wage incentives are intended to encourage youths to find employment or training and to encourage employers to take on unemployed youths. Employment and unemployment statistics as well as NEET figures have not shown much responsiveness to these schemes. Equally, our research shows little direct benefit to younger workers from these initiatives. Whilst Hertfordshire County Council uses a talent pool to recruit and fast-track younger workers, there is no guarantee of full employment at the end of training schemes. The career reviews
as described by those implementing the pilot project have enormous potential in skill development and succession planning, with broader implications for employee motivation. Yet this is no solution for young people who struggle to find any kind of employment, or even work experience. The climate of austerity seems to remain too strong for employers and unions to be considering anything beyond retrenchment or possibly consolidation.

For older workers, the picture is also mixed. Government policy has, on the one hand, been framed in terms of age-equality, with older workers now able to ‘decide’ when to retire. On the other hand, continued working for the majority is a policy priority and not a matter of individual choice. Best practice government publications and aspirational documents such as the ‘Fuller Working Lives’ literature have not only made the financial case for delayed retirement, but also in terms of health and well-being (DWP, 2014). There has been a gradual increase of the working age. However, it is not clear whether this ‘success’ stems from compulsion or voluntary extensions of working lives – it is certainly too early to assess whether promotional campaigns have any direct effect. Moreover, we as yet know little about the employment conditions consequences of the current policy. For example, ‘flexible retirement’ for some of the workers in our study entailed shorter hours, lower pay and lower status employment, and combining working with reliance on pension payments. This highlights the importance of a scheme such as the (mid-life) career review, which helps individuals to evaluate and weigh up the broader implications of employment related choices.

Overall, then, there has been a great deal of discussion, but little evidence of action or concrete results. Perhaps this is not entirely surprising. The twin aims - increasing employment opportunities for younger workers whilst extending the possibilities of longer working lives for older workers – are achievable during times of economic growth, but become antagonistic when employment opportunities and decent wages are scarce. On the part of government, there are some attempts to highlight the issues, but direct enforcement has been restricted to cases, such as abolishing the DRA, which are public finance issues, rather than issues of individual rights. Rather than delegate blame for the lack of change, e.g. onto employers’ short-termism and workers’ resistance to change, we need to consider the wider labour market. The bigger issue, and a key reason why there is little enthusiasm for looking at ‘intergenerational activities’, is thus the continuing repercussions of ‘austerity’.

In this context, the union emphasis on employment, pay and working conditions becomes even more important. The UK has seen an increase in under-employment and workfare for those outside of the labour market. Both in terms of quantity and quality, employment for younger and older workers needs to be fair and appropriate to the individuals’ needs and desires.
Reflections on the concept

In the UK, considering the issues that different age groups face in the labour market and especially with regards to access to employment under the auspices of ‘intergenerational bargaining’ does not seem to capture the debates or the activities that are already under way. Key to this assessment is the situation of trade unions in the UK: the limited amount of collective bargaining that occurs and that the focus of this bargaining also tends to lie on the ‘bread and butter’ themes of pay and working conditions. Whilst bargaining is therefore restricted both in terms of the amount that is possible and the issues that can be included in the negotiations, within the broader equalities agenda there have been interesting developments.

With the publication of ‘Fuller Working Lives’ (DWP, 2014b), the government has set the scene for a much broader conceptualisation of age in the workplace. The actions envisioned include occupational health and health-promotion measures as well as support for care and careers. Although the Fuller Working Lives agenda considers only older workers, it also opens discussion on extending such support to workers of all ages. This is not only because the legislation may judge the differential treatment of workers by age to be discriminatory. It is also because many of these initiatives, by definition, have to be implemented across the age spectrum if they are to have any effect. Prevention of common work-related conditions, for example, has to occur early on in a working life. Thus, rather than applying certain policies (training, health, care) at specific points of the life course, these have to be differentiated to ensure that they are appropriate depending on sectoral, occupational, organisational and individual circumstances. Within the UK context, this is unlikely to counter or reduce the individualisation of responsibilities for employability, but there seems to be a recognition that labour market opportunities may be restricted and that employer behaviour also needs to change. These are developments that can only benefit workers of all ages. To this effect, employment and the labour market must be seen as inherently intergenerational.

However, moving away from practical considerations, there are considerable problems with the use of the term ‘intergenerational’. Even if we assume to have a rough, common sense understanding of what we mean by ‘generations’, their relationships to each other are complex constructs, relating not only to employment but, inter alia, to familial, fiscal, housing and welfare interdependencies. Any attempt to reduce these complexities to an already politicised discussion about a redistribution of employment risks undermining the delicate balances required to establish solidarities, be they within the work-group or more generally in society. The current economic context of austerity and post-recession recovery makes such solidarity all the more essential, and makes inter-generational rivalry more problematic.
Innovative directions and prospects

The research undertaken for this project revealed considerable challenges but also opportunities for the situation of younger and older workers in the UK. Although the case studies revealed some serious issues for all workers and the security of the employment, pay and working conditions, there is also a positive story to tell about the role of trade unions in defending workers’ rights.

The UK’s 2010 age equality legislation has been interpreted very firmly as a requirement for equal treatment of workers at all ages. This interpretation has, in some ways, been restrictive, in particular because of the cautious implementation by employers who have seen this as preventing them from (or giving them an excuse not to) provide any particular support, additional training or other concessions to any age group. However, the legislation also points the way for a more flexible approach to age in collective bargaining. The aim, consistent with the law, needs to be on extending benefits, where appropriate, to all ages.

The Mid-Life Career Review is an excellent example of how this flexibility can be developed. A mechanism intended for workers at a specific age has proved valuable for whole workforces and has consequential benefits for the employer. Thinking of employment not only in contractual and financial terms but also as an activity that shapes lives is an important step towards thinking about age in a more holistic manner. This develops further the remit of the National Careers Service (an important contributor in the Mid-Life Career Review project), which offers confidential and impartial information, advice and guidance to help make decisions about learning, training and work opportunities. Additional issues that can be added in a broader ‘career review’ include issues of health, caring responsibilities and other restrictions to entering or remaining in the labour market. In many ways, this broad approach takes review conversations back to their supportive and developmental foundations. Whereas performance appraisals are now focused on a very narrow aspect of employment and are in many cases explicitly about compliance with a pre-set set of standards, a ‘development review’ takes the individual as its starting point. The aim is to ensure that the worker being reviewed receives the support and opportunities for their development.

Beyond specific initiatives such as this, trade unions have been sceptical of bargaining between age groups – and this scepticism is well-founded. This does not mean, however, that equal treatment needs to involve identical treatment. Equality over the course of the working life must involve recognition that young and old are different, with different strengths and different needs.


**Bibliography:**


BBC (2014) Money fears mean retirement a dream for man, says survey. Available at: www.bbc.co.uk/news/uk-29427209


Eurofound (2012a) NEETs – Young people not in employment, education or training: Characteristics, costs and policy responses in Europe, Publications Office of the European Union, Luxembourg.


Gamwell, S. (2013) United Kingdom: working conditions of young entrants to the labour market, European Working Conditions Observatory.


NIACE (2014) *Mid-life career review, extending working life through career review at mid-life*, Leicester: NIACE.


ONS (2012b) *Older Workers in the Labour Market, 2012*. Available at: www.ons.gov.uk/ons/dcp171776_267809.pdf


PCS (2012a) *MPs’ positive response to members lobby on HMRC closures*. Available at: www.pcs.org.uk/en/news_and_events/pcs_comment/index.cfm/id/F1ADAEA2-E4D7-4C40-B505E98CCC6A456A


SP (2014) HMRC: rolling strikes across country. Available at: www.socialistparty.org.uk/campaign/Public_Services/HMRC/19040


