

Late-career mobility in the United Kingdom: the impact of institutions and policies

Montserrat González Garibay
Ludo Struyven



CONTENTS

Nederlandstalige samenvatting	1
<hr/>	
Chapter 1/ Introduction	5
<hr/>	
Chapter 2/ Institutional context	9
<hr/>	
1. Employment relations system (employment protection)	9
2. Occupational system (training)	11
3. Employment sustaining policy (employment programmes)	12
4. Pension system	13
Chapter 3/ Mobility-related policies	15
<hr/>	
1. Pension reform	15
2. Data availability	16
Chapter 4/ Worklife-enhancing policies	19
<hr/>	
1. Opportunity Age	19
1.1 Train to Gain	23
1.2 Union Learning Representatives	24
2. Anti-discrimination legislation	26
3. Careers Scotland and All Age Guidance Projects	27
4. South East England's '40-70 Tomorrow's Workforce Programme'	30
5. Firm-level practices	32

Chapter / 5 Conclusion: the role of late-career mobility in UK policies	35
--	-----------

Annex List of respondents	41
----------------------------------	-----------

References	43
-------------------	-----------

NEDERLANDSTALIGE SAMENVATTING

Dit rapport bevat de eerste casestudie uit het project 'Het wegnemen van belemmeringen voor arbeidsmobiliteit met het oog op kwalitatieve transitie in de latere loopbaan. Vergelijkende studie en succesvoorwaarden van beleidsmodellen en goede praktijken'. De casestudie bestaat uit een beleidsanalyse van het Britse mobiliteitsregime, met speciale nadruk op oudere werknemers. De analyse behandelt zowel de structurele kenmerken van het Britse mobiliteitsregime als de afzonderlijke beleidsmaatregelen die hebben bijgedragen tot zowel het verlengen van de loopbanen van oudere werknemers als tot hun mobiliteit.

Het rapport is opgebouwd aan de hand van het conceptuele en theoretische kader uit het eerste deelrapport van het project. De belangrijkste kenmerken ervan zijn:

- een brede opvatting van mobiliteit: we kijken naar zowel vrijwillige als gedwongen mobiliteit van werknemers;
- de assumptie dat mobiliteit het product is van zowel structurele kenmerken van het beleidsregime als van concrete beleidsinstrumenten;
- een holistische kijk op de structuur van het beleidsregime. We onderscheiden daarin vier grote domeinen die invloed uitoefenen op de mobiliteit en de loopbanen van oudere werknemers: het systeem van arbeidsverhoudingen, het beroepssysteem (i.e. opleiding), het arbeidsmarkt- en tewerkstellingsbeleid en het pensioensysteem. Daarnaast schenken we aandacht aan de interactie tussen die domeinen;
- een conceptualisering van de beleidsinstrumenten die binnen het regime wordt toegepast in functie van de middelen die aangewend worden: informatie, geld, regelgeving of organisatie.

Op basis van het bovenvermelde kader behandelen we de Britse case in functie van twee vragen, die we onderzocht hebben aan de hand van een literatuurstudie en expertinterviews:

- de eerste vraag betreft de kenmerken van het Britse mobiliteitsregime. Uit de analyse leiden we af dat het Verenigd Koninkrijk gekenmerkt wordt door een institutionele constellatie die mobiliteit sterk bevordert. Ten eerste is het niveau van ontslagbescherming een van de laagste van de OESO-landen. Ten tweede moedigt het opleidingssysteem werknemers aan om in transfereerbare in plaats van specifieke vaardigheden te investeren. Ten derde is het arbeidsmarktbeleid sterk gegrond in de principes van individualisme en activering.

- Ten vierde wordt het vervroegd pensioen niet aangemoedigd door het pensioenstelsel;
- de tweede vraag richt zich op het identificeren van beleidsinstrumenten die binnen het institutionele kader hebben bijgedragen tot de verlenging van de loopbanen van oudere werknemers, of die positieve gevolgen hebben gehad voor hun mobiliteit. Gegeven het structurele karakter van mobiliteit in het Verenigd Koninkrijk zijn er weinig initiatieven ondernomen die rechtstreeks op de mobiliteit van oudere werknemers proberen in te grijpen. Daarnaast worden er ook weinig maatregelen aangenomen (bewustwordingscampagnes, verbod van discriminatie op basis van leeftijd) die specifiek gericht zijn op het verlengen van de loopbanen van oudere werknemers, vermits er geen traditie bestaat om beleidsacties te richten op bepaalde doelgroepen. Desalniettemin zijn er tussen de generieke maatregelen een aantal die mogelijk een positief impact gehad hebben op oudere werknemers: het trainingsprogramma *Train to Gain*, praktijkopleidingen voor volwassenen, de instelling van vakbondsvertegenwoordigers die de toegang tot training faciliteren, en op regionaal vlak de hervorming van de Schotse diensten voor loopbaanbegeleiding. De concrete invloed van de maatregelen op de activiteitsgraad van oudere werknemers is echter niet gemakkelijk te peilen om twee redenen. Ten eerste wordt een aantal van de projecten (zoals in het Schotse geval) op kleine schaal opgezet, wat veralgemeningen naar de gehele arbeidsmarkt onmogelijk maakt. Ten tweede wordt er in evaluaties weinig onderscheid gemaakt tussen de beleidseffecten in functie van de verschillende leeftijdscategorieën.

Uit de analyse van zowel de institutionele structuur als de concrete beleidsmaatregelen kunnen er aantal conclusies getrokken worden met uitzicht voor de Vlaamse beleids- en onderzoeksagenda's:

Met betrekking tot beleidsdesign stellen we het volgende vast:

- mobiliteits- en vergrijzingsbeleid zijn niet de exclusieve bevoegdheid van de staat, zoals de proactieve houding van de Britse vakbonden met betrekking tot training ons leert. In deze zin kunnen de Belgische sectorfondsen een voortrekkersrol gaan bekleden in het bevorderen van deelname aan opleiding door oudere werknemers;
- de fragmentering van bevoegdheden doorheen verschillende overheidsactoren kan negatieve gevolgen hebben voor het opkomen van een geïntegreerde visie rond langer werken. Daarentegen kunnen goed uitgebouwde coördinatiesystemen de versnippering verhelpen;
- beleidsdoelinden met betrekking tot de tewerkstelling van oudere werknemers kunnen door middel van zowel gerichte als niet gerichte beleidsinstrumenten gerealiseerd worden;
- een hoge activiteitsgraad van oudere werknemers gaat niet noodzakelijk gepaard met een systeem waar positieve of kwalitatieve transitie de norm

zijn. Met andere woorden, naast mobiliteit op zich moet het beleid ook rekening houden met aspecten van jobkwaliteit en een onderscheid maken tussen werknemers die langer in de arbeidsmarkt blijven wegens financiële nood en werknemers die actief blijven omwille van hun eigen motivatie;

- bij het uittekenen van het mobiliteits- en vergrijzingsbeleid is het nodig om de sterke interacties in het oog te houden tussen de structurele kenmerken van het mobiliteitsregime, belichaamd door ondermeer het pensioenstelsel, en de zachte maatregelen gericht op het verbeteren van de positie van de werknemers in de arbeidsmarkt. Met andere woorden, een hervorming van het eerste soort maatregelen is niet voldoende om een regime van positieve transitie te verzekeren.

Op vlak van beleidsgerichte onderzoek kunnen we een drietal lessen uit de Britse case trekken:

- zelfs indien er generieke beleidsmaatregelen aangenomen worden, kunnen deze gedifferentieerde effecten hebben op de mobiliteit of activiteitsgraad van verschillende leeftijdsgroepen. Daarom is het belangrijk om tijdens evaluatieprocessen rekening te houden met deze verschillen;
- mobiliteit tijdens de latere loopbaan is geen noodzakelijke voorwaarde voor langere loopbanen: dit wordt bewezen door het feit dat de meeste werknemers die na hun pensioen actief blijven. In deze zin is er onderzoek nodig naar de activiteitspatronen van oudere Vlaamse werknemers;
- om de effecten van mobiliteit goed te kunnen inschatten en een gepast beleid te kunnen uittekenen is de beschikbaarheid van gegevens en betrouwbaar onderzoek cruciaal.

CHAPTER 1

INTRODUCTION

Even though the British mobility patterns display the same composition as Belgium's and Flanders' along the age dimension (i.e. mobility diminishes with age) (McNair, Flynn, Owen, Humphreys & Woodfield, 2004) and although the barriers for working longer in the UK are largely similar to those experienced by Belgian and Flemish workers,¹ the United Kingdom is characterised by a higher level of late-career labour mobility, as well as by a higher proportion of active older workers, which has further increased during the last decade. Some basic statistics are provided in the table below.

Table 1.1 Basic indicators

		UK	Belgium
Population over 65	% of working population	27.3	28.8
Public pension spending	% of GDP	5.4	8.9
Persons 55-64 in employment	% of population in age group (2010)	56.7	37.3
Participation in training of workers aged 55-64	% of the age group	13.6	3.4
Average exit age from the labour force		63.1	61.6
Average job tenure of workers aged 55-64	Years	15.4	24.2

Source: European Commission, DG Employment Social Affairs and Equal Opportunities, 2010; OECD, 2011, 2012; 'OECD Statistics', n.d.

This report traces back the institutional and policy roots of the British older workers' degree of activity and mobility by means of a policy analysis, on the basis of the theoretical model presented in Working Paper 1 of this project. The blueprint for the analysis is set by the following questions:

¹ Additional information on the barriers for mobility in the UK may be found in the previous working paper of this project's series, where several British sources are mentioned.

What are the structural characteristics of the British mobility regime in terms of Buchholz, Hofäcker en Blossfeld's (2006) institutional filters: employment relations system, occupational system, employment sustaining policy and pension system?

- which policy instruments adopted within those institutional filters have had an impact on the activity and mobility of older workers during the last decade?

The UK's mobility level is to be ascribed in the first place to the structural features of the British mobility regime rather than to any conscious efforts to remove the barriers to mobility (Golsch, Haardt & Jenkins, 2006). Those structural features - low employment protection, reduced scope of labour market policies, highly portable pensions, little standardised skills production system - have put pressure on the workers to upgrade their skills, remain in employment until older ages, and accept less qualified or precarious work forms in the case of forced mobility (with downward mobility as a result) (Golsch et al., 2006, p. 186). In addition, the policy-making tradition in the UK, in which no target groups are distinguished and a large part of the labour relationship is managed at the firm rather than at the national level, makes it difficult to implement measures specifically targeted at either mobility or older workers.

In other words, mobility constitutes neither a policy goal for the British government nor a policy means towards lengthening careers. If mobility is taken at all into consideration, it is regarded as a matter belonging to the specific employer-employee relationship, as opposed to the government's or unions' and employers' responsibility.

There are, however, several policy measures with potential impacts on mobility and on the working lives of older workers:

- the pension reforms carried out during the 1980s and 1990s enhanced the workers' freedom to choose from different pension schemes (Andrietti, 2001, 2003; Disney & Emmerson, 2002);
- some policy measures adopted during the last decade, which were partly grouped in the Opportunity Age strategy adopted by the Labour government in 2005, may have contributed to lengthening working lives. The 'Train to Gain' and 'Union Learning Representatives (ULR)' schemes, implemented respectively by the Labour administration and the British trade unions, managed to reach the older population relatively better than other training programmes. Moreover, the Age Discrimination legislation, which implements European directive 2000/78/EC, has triggered according to some experts a cultural change;
- some mobility-related and career-enhancing initiatives have taken place at the regional level, both in Scotland, where the devolved administration reformed the Scottish career services to provide assistance to all ages rather than only during the school-work transition, and South-East England, where several pilot

projects aiming at enhancing the employability of older workers were set up during the late 2000s;

- given the highly decentralised features of the British labour relations system, several initiatives have been adopted at the company level, with or without the participation of unions, that may serve as a best practice for internal mobility.

The remainder of this report develops the policy analysis further on the basis of both expert interviews² and desk research. First, the report provides a short overview of the British institutional system in terms of mobility, based on the dimensions identified by Golsch et al. (2006) (cf. WP1). Second, it sheds some light on the pension reforms from the 1980s in terms of mobility. Third, it assesses the policies that may have contributed to enhance working lives in the framework of Opportunity Age. Fourth, it provides a summary of the regional initiatives mentioned above. The fifth section looks briefly at some best practices at the firm level, and the conclusion presents some critical reflections in the framework of the project's theoretical model (WP1), followed by a number of policy lessons.

² A total of ten interviews were conducted between October 2011 and February 2012. A list of the respondents can be consulted in Annex.

CHAPTER 2

INSTITUTIONAL CONTEXT

Sorensen and Tuma (1981) characterised the UK as an 'individualistic mobility regime' in which wages reflect the individual worker's marginal productivity and employees compete for wage increases. In other words, the British institutional setting can be seen as one of the closest to the ideal type of a liberal state. Whereas that system is in the first place the result of path-dependencies (historically, the system has been a liberal one), most of the policy reforms conducted during the 1980s and 1990s have reinforced its liberal character. They include the restriction of protection against unlawful dismissal, benefit reduction, means-testing for benefit eligibility (i.e. Pension Credit), increased sanctions for the unemployed, in-work benefits, abolition of Wage Councils that set minimum wages at the sector level and strengthening of the portability of pension rights. Furthermore, the power of trade unions has considerably diminished (Golsch et al., 2006, p. 185). The concrete characteristics of the present system are briefly set out below.

1. Employment relations system (employment protection)

The British employment relations system is one of the most flexible across the OECD countries, according to three criteria (OECD, 2004): job protection for workers with regular contracts, the existence of special provisions for collective dismissals and restrictions affecting fixed-term contracts and temporary work agencies.

According to the Employment Rights Act (1996), individual employees are entitled to receive a written statement with the reasons of their dismissal after one year of service.³ In the case of redundancy (20 workers or more dismissed in a period of maximum 90 days) collective consultations (iwith a trade union) are compulsory. Notice periods are relatively short, and severance pay is only compulsory for redundancy cases with a minimum tenure of two years.

³ The one-year period does not apply to employees dismissed during pregnancy or statutory maternity leave.

Generally, unfair dismissal claims can only be filed by employees with a minimum tenure of one year, and their grounds include trade union activity, health and safety-related whistle blowing, pregnancy, maternity and the national minimum wage.

There are practically no restrictions regarding temporary work agencies (i.e. no limits for the number or duration of fixed-term contracts that an employee can accept, nor for temporary work agency contracts and set-up), nor requirements of equal treatment for regular and agency workers at the level of the customer firm.

Additional indicators point at a low level of protection: collective agreements, which are often negotiated at the company level and cover merely a 35% of the workforce, do not offer any employment protection beyond the legislation highlighted above (Venn, 2009, p. 18); pre-court dispute resolution is a requirement before claims for unfair dismissals may be filed before a court (p. 28). Moreover, there is no statutory right to severance pay for non-economic dismissals. In the case of economic dismissals, severance pay is only a right to those employed for at least two years. The amount due increases with the length of employment and the employee's age, and the weekly salary used for the calculation is capped.⁴ A factor further influencing the fluidity of the employment relations is the absence of a pronounced seniority wages curve: as opposed to other countries such as France, salaries do not increase linearly with age (OECD, 2004b, p. 106-109), but vary relatively little throughout a worker's career.

It should be noted that, with the exception of some modifications to the minimum requirements to claim dismissal, the employment relations system has changed little since the 1980s. This is evident from the little changes in the value of the OECD indicators for the UK (Venn, 2009, p 9). However, some evolutions should be taken into consideration. First, the administration has tried to encourage pre-court dispute resolution, first by introducing a compulsory three-step procedure to be followed by employers (2004), and later through an Advisory, Conciliation and Arbitration Service Code of Practice (2009) (Venn, 2009, p. 34). Second, the liberalizing trend that set off during the Thatcher period has been set forth by the current administration. An October 2011 report by Adrian Beecroft, commissioned by the British government, suggested the relaxation of the British regulations concerning unfair dismissal, through a.o. the reduction of the compulsory consultation period for collective dismissals. However, the proposal triggered opposition from both the Liberal Democrats and trade unions, and has not been implemented so far (Hope & Winnett, 2011).

⁴ A detailed description of the UK's Employment Protection Legislation can be found in the ILO's EPLex Database:
http://www.ilo.org/dyn/epl/termdisplay.severancePay?p_lang=en&p_country=BE&p_all_years=Y.

2. Occupational system (training)

The British occupational or skills production system fits within the broader description of the country as a liberal mobility regime and as such it displays three remarkable features that contrast with coordinated market economies such as Germany.⁵ In the first place, the volatility of employment relationships that stems from a relatively unregulated labour market has generated a 'low-skills equilibrium' (Finegold & Soskice, 1988), in which workers are encouraged by the system to invest on transferrable rather than specific skills (i.e. the fact that they can easily lose their job precludes investments in job-specific training). The demand for specific skills had been covered, until the de-industrialisation period, by employers, who offered on-the-job training. After the 1960s, the provision of employer-based apprenticeships experienced a decline (Grubb, 2004, p. 6-10). Second, the state's laissez-faire policy with regard to the labour market extends to the educational system, where there is no official standardisation of curricula for vocational education,⁶ although some attempts have been made during the last decades to reverse the situation (cf. *infra*). Third, the connection between the skills obtained by individuals through the educational system and their position in the labour market is low (Schmelzer, 2011, p. 6). In other words, educational qualifications are not used by workers in order to obtain a certain position in the labour market, what increases the probability of job mismatches. Moreover, as stated by a respondent, the UK is characterised by a large skills divide among employees: employer-financed training is mostly available for highly skilled workers, whereas the low-skilled enjoy less opportunities.

Attempts were undertaken during the last three decades to change the British skills system. First, a National Vocational Qualification (NVQ) system was devised, in which distinct competence levels were identified with the goal of both certifying existing competences and streamlining vocational training. However, in spite of the large number of certifications awarded, the initiative has proven little successful (Grugulis, 2003). Second, an attempt was made by the Labour administration to revive the lost tradition of apprenticeships (Grubb, 2004) and to create a system similar to Germany's, where the production of specific skills is both linked to firm-related training and to the vocational education system. However, the system does not seem to have been a straight success (cf. *infra*). It should be noted here that skills provision in the UK, as opposed to the rest of Europe, is largely taken care of by private partners, either for-profit or non-profit, which enjoy access to government subsidies or are directly paid by the employer or the worker.

⁵ The German and British models of skills production have been repeatedly compared. See for instance Culpepper and Thelen (2008); Schmelzer (2011).

⁶ Some standardisation is present in the case of general education (Steinman, n.d.).

In addition to the above, the sharp distinction between those inside and outside employment in the United Kingdom (cf. *infra*) is pervasive as well across training and skills matters: given the focus of labour market policies in bringing the unemployed back into work, regardless of the characteristics of that work, training becomes important only insofar as it can help achieve employment. This implies that the Public Employment Services focus on job-search training, rather than job-specific training. At the same time, a clear pattern of institutional complementarity can be discerned: the success of labour market policies that ignore the provision of job-specific skills is only successful due to the lack of a system in which formal qualifications are required to access certain occupations (cf. *supra*).

The division in skills provision for the employed and the unemployed is further reflected in the fact that, at the moment, the provision of training for those in employment falls within the BIS department, whereas the training of the unemployed is the competence of DWP.

3. Employment sustaining policy (employment programmes)

Even though the British institutional setting has been traditionally characterised by an emphasis on individualism, social norms regarding the unemployed as ‘undeserving’⁷ (Van Oorschot, 2000) and, accordingly, by a modest role of the state concerning labour market policies (VoC), an explicit and pronounced turn towards neoliberal policies took place during the last four decades, which has further helped to reinforce that character (Schmidt, 2001): the post-war Keynesian welfare state in which the maintenance of purchasing power (either through social transfers or work-derived income) in a demand-driven economy was the norm was replaced by a Schumpeterian state that emphasises international competitiveness and labour market flexibility (Clasen & Clegg, 2003).

According to King (1995), British social policy, first enacted by the 1834 Poor Law, is characterised by a punitive approach: the Poor Law established that, in order to be entitled to benefits, ‘the recipient’s condition should be worse than that of the poorest labourer’. This was done in order to deter workers from seeking benefits (King, 1995, p. 5, 227). In other words, labour market policies were from the outset focused on the most disadvantaged, what according to King implied an ‘institutional bias’ that constrained policy-making and prevented the success of strategies targeting the workforce as a whole. This was confirmed by one of the respondents, who emphasised the fact that British labour market policies are based on the assumption that workers engaging into either forced or voluntary mobility are

⁷ This is contested by Clasen and Clegg (2003), who claim that the British labour market regime presents striking similarities to the French one, which is traditionally classified on the other side of the liberal-regulatory regime spectrum.

capable of finding work by themselves.⁸ In this setting, the state fulfils a 'reactive' role through the provision of assistance only to those who are not able to enter the labour market by themselves. In this vein, we can also Anxo, Guillemard, Ericson and Jolivet's observation (2011, p. 38) that there has been no integration of British labour market and welfare policies. Active labour market policies are rather regarded as a substitute for rather than a precondition of income maintenance programmes.

The structural reforms undertaken by the Thatcher, Major and Blair governments fit the historical pattern outlined above. During the 1980s and 1990s unemployment benefits were reduced and subjected to more restrictive conditions, with the Jobseeker's Allowance being the most emblematic.⁹ It was introduced in 1996 in order to replace the previous benefit system, and implied two main changes (Manning, 2005). First, eligibility criteria were tightened: jobseekers were required to sign an agreement with the employment services detailing job search activities. Those activities were closely monitored, and the threat of sanctions against non-compliance was increased. Second, the duration of benefits was reduced from twelve to six months. At the same time, the focus of the Public Employment Services shifted from 'protecting jobs' to helping those unable to find a job by themselves.

The transition from a Conservative to a Labour cabinet in 1997 did not imply major deviations from the structural liberalisation trend. The new administration emphasised labour market activation policies (as opposed to an exclusive reliance on unemployment benefits) through, among others, training (cf. *infra*) and the implementation of New Deal policy programmes, which targeted specific groups of unemployed people (i.e. youngsters and older workers, cf. Atkinson, 2001). In addition, the Employment Zone initiative attempted to redress unemployment in the most disadvantaged labour market areas (Finn, 2005, p. 109-114). At the same time a national Minimum Wage was introduced in 1999, what may be considered a deviation from the path that was being followed (Golsch et al., 2006, p. 185).

4. Pension system

The pension system in the United Kingdom was subsequently reformed during the 1980s and 1990s (Disney & Emmerson, 2002). Until 1986, there were two types

⁸ This is indicative of the liberal nature of the British institutional configuration, where the individual has a preponderant role.

⁹ Finn (2005, p. 103) points at the fact that it was only after the elections of 1987 that the government emphasised the market-based discourse and employer-driven public policy, which was reflected in the establishment of Training and Enterprise Councils (TEC), led by the employers, to provide training. Previously, the tripartite Manpower Services Commission, founded in 1974, had had a large role in the management of unemployment.

of official pensions: state-based and occupational (i.e. employer-related), both of the defined-benefit form. The establishment of an occupational scheme implied a reduced payroll tax for the employer (the difference between the two contributions becomes then the contracted out rebate). If occupational schemes were available, employees were obliged to join them (i.e. to 'contract-out'). In addition, employers were free to offer defined contribution schemes, but they were not regarded as part of the mandatory pension system.

After 1986, contracting-out options became diversified. First, employers were free to establish defined-contribution schemes as part of the official pensions, and individuals were given freedom to choose among distinct pension schemes. Second, those schemes were reorganised in a three-tier structure (OECD, 2011):

- the first tier was composed of a 'basic flat-rate pension' and a means-tested benefit;
- for the second tier, the individual can choose among three options. First, the Approved Personal Pension (APP) implies that individuals may choose for an individual retirement savings account. The Department of Social Security pays the contracted out rebate to the individual's account, which is based at a freely chosen provider. A variant of the system exists in which the contribution is paid by an insurance company. Second, the employee may choose instead an occupational pension, provided by the employer. Third, if no contracting-out occurs, the employee will enjoy a State Earnings-Related Pension Scheme (SERPS), which is fully administered by the state;
- a third tier, made up by the individual worker's voluntary pension savings. The Pensions Act 2008 introduced incentives for saving.

It should be noted that the choice across systems does not preclude a certain portability of rights across the second-tier schemes. Throughout their careers, individuals may switch from APP to SERPS or occupational pensions while partially preserving their benefits, even though certain systems may prove more advantageous for switching positions in the labour market (cf. *infra*).

In addition to the reform of pension schemes themselves, the pension age has suffered several changes during the last years. The State Pension Age, at which workers start to receive benefits, is being equalised for men and women to reach 65 in 2020 (in 2009 it was 60 for women). The Pensions Act 2007 increases it further to 66 (between 2024 and 2028) and to 68 (between 2044 and 2046). Moreover, the Default Retirement Age (DRA), a measure implemented in 2006 that allowed employers to oblige employees to retire, was abolished in 2011¹⁰ (cf. *infra*).

¹⁰ It should be noted that the DRA is different from the pension age: whereas the DRA embodies the employer's right to oblige the worker to retire, the pension age establishes the minimum age at which a worker is entitled to receive a pension. In other words, as noted by one of the respondents, the DRA is fully unrelated to the discussion about pension benefits.

CHAPTER 3

MOBILITY-RELATED POLICIES

As it has become clear from the previous section, the current institutional setting of the UK features several built-in incentives for labour mobility and working longer: a little generous unemployment welfare system, relaxed employment protection legislation, a little systematised skills production system and a flexible pension system. However, mobility has not been a policy priority for any of the recent administrations,¹¹ even if research has pointed at the fact that changing job roles may encourage longer careers (McNair, Flynn & Dutton,¹² 2007, p. 96-101). Against this context, this section traces the policy roots of the current mobility-enhancing system by assessing the pension reforms of the 1980s. It also contrasts the absence of mobility policies with the availability of data to measure British mobility patterns.

1. Pension reform

The 1985 programme for the reform of the British social security system, produced by the Conservative government led by Margaret Thatcher stated that ‘a major factor in the demand for personal pensions has always been that they should be fully portable. People must be able to take their own pensions with them without any loss when they change jobs. The Government is committed to ensuring that *barriers in pensions do not affect job mobility*¹³ (Department of Social Security, 1985, quoted in Disney & Emmerson, 2002, p. 1). The pension system was subsequently

¹¹ According to one of the interviewed experts, external mobility was researched in the framework of a recent pension reform, but soon discarded due to the fact that active older workers tend to remain with the same employer rather than changing. Similarly, Smeaton and McKay (2003) state that the majority of those older adults working after State Pension Age do so in their pre-pension job.

¹² In a series of employer interviews conducted in England, the authors found that several employers were in favour of job change as a way of keeping workers longer in employments. However, they noted as well that it were larger employers and some specific sectors (Manufacturing, Retail and Hospitality) who had the possibility of offering internal mobility schemes to their workforce.

¹³ Italics added.

reformed in the way described above, in order to enhance the portability of pensions.

British pensions, though not officially evaluated, generated scientific interest due to the unique nature of the British pension system among the OECD countries regarding the choice among pension regimes and the capacity to contract out, and to the fact that the reforms provided a *quasi*-experimental setting. During the 1980s and 1990s, some authors found a negative influence of occupational pensions on job mobility (McCormick & Hughes, 1984; Meally & Pudney, 1996). Later, Meghir and Whitehouse (1997) suggested that workers who do not benefit from an occupational pension 'possibly have stronger labour market attachment' than workers on a SERPS, even though their empirical evidence was meagre.

Studies based on the changes conducted to pensions during the 1980s and the 1990s have been studied by Andrietti (2001, 2003) and Disney and Emmerson (2002). Using data from the British Household Panel, Disney and Emmerson found that mobile individuals 'select pension arrangements that *a priori* impose lower costs on job mobility', i.e. individuals on occupational pensions are less mobile than individuals in other arrangements. They point, however, at the fact that employer selection may occur, in which occupational pensions are offered to individuals less likely to change jobs. Lluberas (2008) confirms the finding.

However, Andrietti (2003) argues that the relationship between occupational pensions and mobility is spurious, since pension choices are endogenous to the job rather than an indicator of future mobility (e.g. jobs with occupational pensions have better wages). Similarly, in an international comparison based on European Community Household Panel (ECHP) data (2001), the same author finds that, even though British workers are less likely to change jobs if they are pension-covered, losses in pension portability do not deter mobility.

In addition to the academic analyses outlined above, it should be noted that a respondent pointed out at the fact that pension portability of occupational pensions did not truly increase after the reform but rather became fragmented, with workers on occupational pensions who change jobs having several small 'pensions pots'.

2. Data availability

In the framework of the analysis provided above, it should be noted that, in spite of the lack of evaluations of policy measures from the point of view of mobility, the United Kingdom disposes of longitudinal datasets that largely facilitate the measurement of mobility: the British Household Panel Survey provides freely available work-life histories (i.e. datasets that follow the employment spells of

individuals across survey waves), which allow to conduct analysis that incorporate time dimensions.

CHAPTER 4

WORKLIFE-ENHANCING POLICIES

During the last decade, the UK government has implemented several initiatives targeting adult workers in the fields of training (Train to Gain, Union Learning Fund) and age discrimination (Age Discrimination Legislation). Furthermore, those initiatives have been grouped in the Opportunity Age strategy, produced in 2005 by the cabinet. It should be noted, however, that establishing a direct causal relationship between the policy initiatives and the increased degree of older workers' activity that has been indicated in the introduction is a cumbersome endeavour due to two reasons:

- evaluations of the policies in question from the perspective of older workers' activity and mobility are scant (for an exception see Newton, 2009), mainly because those policies are not necessarily targeted at extending older workers' activity, but rather at boosting the employability of the workforce as a whole. In this sense, a respondent noted that the British approach towards older workers has been more focused on retirement age issues than on enhancing workers' employability;
- older workers' employment has been influenced by cohort dynamics during the last decades: the proportion of ageing persons in the workforce all over Europe has increased as a consequence of the incorporation of females to the workforce during the 1970s (European Commission, 2007). In this sense, one of the interviewed experts points at the fact that it is those cohort effects rather than any policy initiative which are responsible for increased participation in the UK, and a study (Bridges & Disney, 2005 quoted in Smeaton & Vegeris, 2009) argues that the increase is associated with an economic upturn.

While taking the above caveat into account, this section offers a brief overview of a number of policies that might be connected with the heightened labour market participation of older workers. Evaluation results are provided where available.

1. Opportunity Age

As opposed to the case of mobility policies, British policy makers have attempted to prolong working lives by means of a comprehensive approach. Concretely,

older workers were a priority for the Blair administration in the beginning of the 2000s. A strategy on ageing, *Opportunity Age*, was produced by the government in 2005, under the lead of the Department for Work and Pensions (DWP). It encompassed three main substantive areas – employment, income and housing, and services to promote well-being and independence.

The employment-related goals set by *Opportunity Age* and the corresponding policy initiatives were the following (*Opportunity Age*, 2005):

- to increase the number of older working people by one million¹⁴ (no deadline proposed). This would be done by ‘tackling barriers to continued employment for those aged over 50, countering unemployment and inactivity, and encouraging more people to work up to and beyond current State Pension Age’. This would be done by means of the Pensions Act 2004 and the introduction of more generous State Pension deferral options (i.e. enhancement of pensions if workers delay taking their State Pension for five years);
- to tackle age discrimination by means of the implementation of the 2006 age discrimination legislation (cf. *supra*) and the establishment of a Commission for Equality and Human Rights (CEHR). An important measure deriving from this goal was to eliminate fixed retirement ages in the long term;
- to enhance the skills of older workers through supporting training in the workplace (i.e. Train to Gain);
- to allow for the combination of work and family responsibilities by extending the scope of the April 2003 flagship employment law, which aimed at helping parents with young or disabled children to balance their responsibilities;
- to help the older unemployed to return to work.

In addition, the strategy foresaw a number of organisational measures to be adopted by the government in order to ensure the swift execution of the programme: inter-departmental coordination under DWP’s lead, the creation of the CEHR, the establishment of a DWP-based Observatory on Ageing, performance assessment and implementation reviews, etc. It should be noted in this regard that policy-making in the field of labour is highly fragmented in the UK: whereas issues regarding unemployment and pensions are the responsibility of DWP, the development of skills and employment relationships and rights (i.e. industrial relations) is the domain of BIS.¹⁵

¹⁴ It should be noted that this goal was embedded in the aim to reach an 80% employment rate.

¹⁵ Until 2007, skills development belonged to the Department for Education and Skills. It subsequently became the domain of the Department for Innovation, Universities and Skills, and in 2009 it was integrated into BIS.

A 2009 implementation report highlighted the measures adopted with regard to the strategy, which included (Older People & Society Division, 2009):

- the introduction of Age Discrimination legislation, which prohibited discrimination in employment and training (2006);
- information campaigns (Age Positive, Be Ready) aimed at changing employer attitudes. In the framework of the campaign, sector models were developed for encouraging longer careers;
- changes in the pension age;
- a Face-to-Face Pilot project offering guidance on retirement issues;
- the introduction of skills-related programmes, such as Train to Gain, continued support for the Union Learning Fund and Union Learning Representatives (cf. *infra*) and the expansion of Adult Apprenticeships for people over 25. In addition, a right to request Time to Train was implemented in 2010. Time to Train implies that every workers has the right to ask their employer for time off from work to train. The employer is obliged to give serious consideration to the request, and motivate denials with business reasons. Decisions may be appealed by the employee;
- a reform of the Incapacity Benefit;
- the right to flexible working contained in the Work and Families Act 2006 was extended to carers;
- coordination mechanisms were established in the form of a United Kingdom Advisory Forum on Ageing (UKAFA) and a Cabinet sub-committee on Ageing.

When the Opportunity Age strategy and its implementation are assessed in the framework of the British institutional background, several conclusions can be drawn:

- even though the strategy presents itself as a comprehensive approach towards older workers, some of the measures it contains (i.e. reform of Incapacity Benefits, Train to Gain) are general labour market measures, which have not been specifically designed for older workers. Furthermore, no evaluation of the strategy as a coherent plan has been published¹⁶ and the individual measures have not been evaluated from a specific older workers perspective. However, the government did commission some literature- and interview-based studies on older workers in the labour market¹⁷ (for a recent research report see Smeaton & Vegeris,¹⁸ 2009);

¹⁶ The implementation report is limited to enumerating all adopted and planned policy initiatives related to the strategy.

¹⁷ This implies large differences with the Finnish case where the Finnish National Plan on Ageing Workers (FINPAW) provided a holistic vision of older workers.

¹⁸ The authors claim that, even in the case that an overall evaluation were conducted, the effects would be difficult to disentangle due to the comprehensive approach and the large number of measures that have been adopted.

- the aforementioned lack of a specific approach towards older workers was confirmed by a number of interviewed experts. One of them pointed at the fact that British policy-making is inherently characterised by a ‘horizontal’ approach, where specific groups are not targeted by particular instruments, even if those instruments do affect different societal groups in a different way;
- the policy instruments used by Opportunity Age fit within the UK’s institutional setting, since they imply little intervention from the public sector: they are, in the first place, often limited to manipulating financial incentives (i.e. pension reforms), exhortation (i.e. Age Positive) or rights, either negative (Age Discrimination Legislation) or positive (Time to Train). Service provision on the part of the government is practically absent. In this framework, the space left by the government is not filled up by the social partners, but rather by private service providers;¹⁹
- there is little continuity in older workers’ policies: lacking both a tradition of state intervention and of policies targeted at older workers, Opportunity Age did not survive the administration change and the economic crisis that started in 2008. In this context, the current cabinet focuses rather on reducing youth unemployment than on prolonging working life. Yet, given the cultural change and the abolishment of the DRA, the return to early retirement policies seems to have fully disappeared as a policy option, as stated by one of the respondents;
- in spite of the presence of formal coordination mechanisms, there is still a lack of coordination across government instances. A respondent exemplified this lack of a unified vision with the pensions discussion, during which BIS supported the preservation of the DRA, whereas the DWP was clearly against it.²⁰ A second expert emphasised the fact that there is little connection between those policies regarding skills provision for the unemployed and skills provisions for workers. From the point of view of mobility, this constitutes a major obstacle for a unified vision of career planning and the connection between forced and voluntary mobility. Furthermore, the fact that respondents themselves were in general little aware of the interconnections between policies regarding pensions, older workers and skills provision seems indicative of the lack of an integrated approach across government agencies,²¹
- training measures fit within the British government’s general regime towards mobility: they are not focused on service provision by the government itself, but rather on the provision of subsidies to either employers or private service

¹⁹ This seems to be illustrative of the British institutional path dependencies regarding non-regulation of markets.

²⁰ This is related, on its turn, to the historical roots of the two ministries: whereas BIS historically leaned towards the priorities of business, DWP was from its inception considered as ‘the voice of labour’ according to the respondent.

²¹ One trade union respondent pointed at the fact that his organisation’s internal task distribution had adapted to mirror the DWP-BIS dividing line.

providers. In addition, the British government has shunned a regulatory approach towards training by means, for instance, of collective bargaining mechanisms.

During the 1990s and the 2000s, several measures were taken in order to improve the skills level of British adult populations (cf. *supra*, low-skill equilibrium), and skills issues have repeatedly been identified as a policy priority. For instance, the 2006 Leitch review, which was focused on the identification of the UK's future skills needs, drew attention to the low-skilled ageing population in the context of an increasing demand for higher skills as one of the most important challenges to the skills landscape. We provide a brief overview of the most important measures from the perspective of the project, and highlight results from evaluations when possible. An overview of skills-related policies, both within and outside the UK, is provided by Johnson et al. (2009).

1.1 Train to Gain

The Train to Gain initiative, undertaken in 2005 by the British government and managed by the former Learning and Skills Council,²² a non-departmental public sector body, had two main aims. In the first place, it provided training advice to employers by means of a brokers' network. In the second place, it subsidised training activities for individual workers in the framework of existing programmes (e.g. Skills for Life, Apprenticeships). Its ultimate aim was to raise the British workforce's qualifications level (cf. *supra*, 'low skills equilibrium') to counter the post-industrial decay of employer-led skills provision. The programme was specifically targeted at 'hard to reach' employers (i.e. those without an Investors in People distinctive)²³ (Comptroller & Auditor General, 2009).

Concretely, Train to Gain focused on providing level 2-qualifications within the framework of the National Vocational Qualification system (cf. *supra*), which according to one of the respondents should be similar to the competences of someone who has finished vocational level training.

²² The Council was replaced in 2010 by the Skills Funding Agency, linked to BIS and dealing with adult training, and the Young People's Learning Agency, linked to the Department of Education and dealing with the training of 16-19 year olds.

²³ 'Investors in People' is a voluntary employer certification scheme by which employers agree to be monitored on a number of self-elected domains, among which training policies. See <http://www.investorsinpeople.co.uk/Facts/Framework/Pages/default.aspx>.

Several evaluations of the Train to Gain programme took place in the form of large-scale surveys of employers and learners. Although references to specific age categories were not pervasive in the evaluations, Newton (2009) distilled a few findings regarding the impact of the programme on older workers from the learner surveys:

- with one out of three learners being older than 45, during the period under evaluation (i.e. six annual waves from 2006 to 2011) the programme managed to reach workers who would have been less likely to receive training otherwise;
- satisfaction with training was large, both among learners and employers, a large proportion of which considered it beneficial;
- the programme likely constituted a bridge to increased training, as 69% of the participants declared to be willing to pursue further qualifications.

Against these positive findings it should be noted, however, that according to one of the interviewed experts the fact that Train to Gain succeeded in reaching a large proportion of older workers may not be related to the programme's inherent features as much as to the fact that older workers were over-represented in the group of the low-skilled, as they belong to the generations who left school early, often to become employed in manual jobs that did not require basic numeracy and literacy skills.

As it can be inferred from the text above, Train to Gain was mainly aimed at providing in-work training, employer-led, and as such it was more likely to improve retention than external mobility.²⁴ In addition, the programme was not aimed at older workers but rather at the whole population.

1.2 Union Learning Representatives

Union Learning Representatives (ULR) was an initiative adopted by the British trade unions during the 1990s, which consisted of creating a 'new type of union activist' (Hoque & Bacon, 2011) who has the role of enhancing the workforce's skills' levels by promoting training, either at the employer level (i.e. convincing the employer to provide training) or at the workers' level (through the provision of advice). In other words, they adopt the role of 'training brokers' between the employees and the employers and services providers: they can conduct Training Needs Assessments and negotiate with service providers and employers in order to organise training at the firm level.

The ULR role was created following two findings regarding skills policy in England. First, in the framework of the Moser Enquiry (1998), it was found that a

²⁴ Improving retention of older workers was however not an explicit aim of the measure.

large number of adult workers (at the time seven million) was functionally illiterate, what makes them little likely to request or participate in training.²⁵ Second, it was assumed that unions were well-placed to help promoting the demand for training, as the proximity between union members and unskilled workers would foster the latter's confidence.²⁶ In order to fulfil their functions, ULR are trained by the British trade unions themselves in order to deal with skills providers, unions and employers.²⁷

The British government, though not involved in setting up the initiative, has provided substantial funding to the ULR through the creation of a Union Learning Fund, which has been increased several times (its initial budget of about GBP 2 million in 1997 reached GBP 15 million in 2011). The ULF's objective is to allow unions to 'bid for money to run projects designed to improve the union's capacity to recruit and develop ULRs and to improve the union's overall effort in this area' (Bruggeman & de Lavergne, 2010). These efforts include the creation of training centres at the firm level.

The numerous evaluations of the ULR that have been conducted suggest a positive balance (Ross, Kumarappan, Moore, & Wood, 2011; Stuart, Cook, Cutter, & Winterton, 2010; Wood & Moore, 2005):

- ULR enjoy widespread support of workers and employers, whose involvement is high (59% of the interviewed sample);
- the degree of inclusion of target groups is high (they constitute a focus in 43% of the projects);
- demand for training has largely been met;
- ULR projects have triggered further learning: 76% of those workers with previous qualifications at or below NVQ Level 2 are learning at a higher level than the one at which they started;
- even though there is no specific evaluation for older workers, there was agreement among several respondents on the fact that ULR are better positioned to reach older workers: 60% of the learners are 40 or over. However, the Train to Gain disclaimer about older workers being reached 'by default' may also be valid in this case.

In addition to the above evaluations, it has been pointed out at the ULR's potential as a tool to deal with re-skilling or upskilling in the framework of redundancies following restructuring. Critical factors for the success of ULR and ULF may include the transparency of the ULR-employer relationship and his support

²⁵ A copy of the report may be found in <http://www.lifelonglearning.co.uk/mosergroup/>.

²⁶ In addition, (Bruggeman & de Lavergne, 2010) quote a survey finding in which the likelihood of receiving training is 15% higher for workers in workplaces where a union is active.

²⁷ The Trade Union Congress (TUC) has since established an internal body called Unionlearn, which has the function of assisting individual unions in the provision of training.

(including the provision of paid off time) and the workers' acceptance of the confidential character of the information they provide to their ULR (Bruggeman & de Lavergne, 2010). In this sense, the ULR's success is bound to the specific characteristics at the workplace, rather than to the policy's general features. Furthermore, it should be noted that although the Employment Act (2003) provided some legal backing to the programme,²⁸ it remains a voluntary initiative: cooperation in the framework of restructuring is for instance not compulsory.²⁹

2. Anti-discrimination legislation

Several of the respondents as well as an evaluation (Brooks, 2011) ascribe the cultural change towards a 'working longer culture' referred to above to the Age Discrimination Legislation, which was first introduced in 2006 by the Employment Equality (Age) Regulations and further consolidated together with other equality regulations in the 2010 Equality Act (TUC & CIPD, 2011). Some of the Act's highlights are:

- it includes employers, vocational training providers, trade unions, employer organisations and trustees and managers of occupational pension schemes among those actors potentially liable for discrimination;
- it forbids direct discrimination (i.e. against an individual), indirect discrimination (disadvantaging an age group), harassment and victimisation³⁰ (as a consequence of age-related complaints).

In the aftermath of the Equality Act, the DRA was removed by further government Regulations in 2010.³¹ This implies that retirement is no longer seen as a lawful reason for dismissal: employees have the right to stay at work after retirement, and employers can be challenged on legal grounds by making a worker's retirement compulsory.

Formal evaluations of the Age Discrimination legislation's and the DRA-related regulations' impact in terms of recruitment of older workers have not taken place so far, although some respondents indicated a cultural shift in British attitudes

²⁸ The Act provided ULR with the right to paid time off work in order to perform their duties. Conversely, employees are not entitled to paid off time to receive advice from the ULR. For a description of the legislation see <http://www.eurofound.europa.eu/eiro/2002/10/feature/uk0210103f.htm>.

²⁹ According to one of the respondents, this is related to the UK government's reluctance to grant training rights to the unions in the framework of collective bargaining.

³⁰ In addition to the prohibition of discrimination, the Act introduces a positive duty for public bodies to contribute to its elimination.

³¹ The removal of the DRA had a unique political economy, opposed to that of pension age reform in Belgium and most of Western Europe: whereas workers' organisations lobbied for the removal of barriers to working longer, employers' organisations opposed it (*TUC Equality Audit 2009*, 2009).

towards working longer, partly as a consequence of the regulations. That cultural change would consist of both a reduction in the discrimination of older workers and an evolution of the 'early retirement mentality' towards the 'longer working mentality'.³²

In this context, a quick comparison of pre- and post-ADL surveys of employers' attitudes³³ towards working longer may offer more concrete insights on any potential changes, even if the causal relationship remains impossible to prove. Metcalf and Meadows, 2010 (2010) document several changes during the period 2006-2010. They mention, among others, an increase in the number of surveyed organisations having equal opportunities policies, a likely increase of age-consciousness in the provision of training and a decrease on age-based discrimination in the provision of training, a decrease in the explicit use of age as a formal recruitment criterion (as opposed to a little decrease in the use of age as a criterion in practice), a reduction of discrimination with regard to determining pay levels, and a fall in the use of age as a criterion for making people redundant.

Nevertheless, the researchers found no substantial changes in employers' attitudes regarding age. In this context, one respondent recalled the fact that older workers, though now legally protected against retirement-based dismissal, still face considerable difficulties to be hired in the case of redundancies. This, together with the fact that the legislation was essentially adopted in order to transpose EU legislation, puts into perspective the claim that a true cultural change has taken place.

3. Careers Scotland and All Age Guidance Projects

It is clear, from the above overview of British policies, that the existence of path dependencies has largely precluded the development of mobility-related policies. Nevertheless, path dependencies at the national level do not fully preclude innovations at the sub-national one. In this sense, the Scottish career services have

³² This is illustrated, for instance, by the fact that a 2008 CBI survey found that 31 percent of workers reaching retirement age are willing to keep on working. This implied a substantial rise from the previous year. Other surveys, quoted by *TUC Equality Audit 2009* (2009) and Smeaton and Vegeris (2009, p. 30-31) find similar results. However, some interviewed experts put this cultural change into perspective by pointing at the fact that the heightened labour market participation of older workers during the last decade can be positively evaluated only from the quantitative point of view. Qualitatively, the recent surge in self-employment of older workers should be placed in the light of higher feelings of financial insecurity and lower job quality; in the same vein Casey and Li (2010) find on the basis of statistical data from Labour Force Survey that lower level occupations and lower wages concentrated in older 'job changers'. In other words, employees may not want to work because of changing conceptions of age as much as because they are constrained to do so by financial hardship.

³³ The initial survey was explicitly designed to provide a baseline for comparison with the post-ADL landscape.

incorporated a transitional labour market vision to the reform of its career services. The details of that reform are provided below.

The United Kingdom has evolved from a unitary state form, in which policies are mainly designed at the national level, into a devolved state, in which some autonomy has been granted to its sub-national entities for a number of policy fields, among which career services. Those services were traditionally focused on the provision of Information, Advice and Guidance (IAG) for those making a transition from school to work. At the same time, employment policy, including placement services for the unemployed, remains a UK policy competence.

In 1999, a comprehensive review of the Scottish career services was announced. Thereto, a Careers Service Review Committee was established under the lead of Barbara Duffner, and conducted several consultations during 1999 and 2000. The process took place in close consultation with the OECD.

The Committee's final report (the Duffner report) proposed a comprehensive reform of the Scottish careers services, based on a change of assumptions (Careers Service Review Committee, n.d.). Whereas so far the service had been operating on the basis of the assumption that 'the first destination will be the start of a career in one company or one profession', the Duffner report noted that 'individuals are now expected to be able to change career paths and develop different skill sets over their working life'. In other words, it considered mobility as a given fact.³⁴

Concretely, the report proposed to replace the focus on school-to-work transitions of the career services with a broader, all-age focus in which all individuals were entitled to services free of charge.³⁵ Furthermore, it recommended the incorporation of the local entities into a single national service.

Following the report, career services were consolidated in 2002 in a single entity, Careers Scotland, which grouped the former Careers Service, Education Business Partnerships, Adult Guidance Networks and Local Learning Partnerships. Careers Scotland adopted the all-age approach of the Duffner report, and defined its focus as 'career planning, linked to economic inclusion, enterprise and employability'. Furthermore, it aimed at making Scotland a '**career-resilient society**'.³⁶ The

³⁴ Other matters such as accountability, coordination with other services and the move from local to Scotland-wide service provision were also addressed by the Duffner report.

³⁵ The report argued that, should the demand for free services prove too large to be met, priority should be given to youngsters until 24 years of age, those in relevant education, people with disabilities, the low qualified, the unemployed or unwaged, and those in declining industries. Older workers were not mentioned as a priority group.

³⁶ Watts (2005) noted the repeated use of this term in internal policy documents.

organisation's strategic aim was 'to equip individuals with the skills to make well informed realistic career decisions *throughout their working lives*'³⁷ (Watts, 2005).

The new organisation was linked to the Scottish Executive (the Scottish sub-national government) by embedding it into two branches of an already existing public body, Enterprise Networks (in total, 79 organisations were brought together) (Scottish Executive, 2005). In 2008 further integration took place between Careers Scotland, the skills bodies of the Enterprise Networks and the Scottish University for Industry (learndirect Scotland). The new body, Skills Development Scotland, took over the all-age focus of Careers Scotland.³⁸

An evaluation of Careers Scotland on the basis of OECD criteria³⁹ was conducted in 2005. It concluded that Scotland, together with Wales' careers service,⁴⁰ was at the time a forerunner with regard to career guidance in terms of the OECD recommendations. It highlighted, among others, Career Scotland's service delivery model, which identified three levels of service in function of the individuals' readiness with regard to career decisions: self-help services, staff-assisted services and intensive (individual case-managed) services. Furthermore, Careers Scotland established a cooperation network (Partnership Action for Continuing Employment, PACE) that involves local partners and the UK's Public Employment Services (JobCentre Plus) in order to offer career services to workers who have been made redundant, and links were established with trade unions through the Scottish Union Learning Fund (cf. supra). The evaluation also mentioned the internal governance of Careers Scotland, in which several stakeholders are involved at the local level through Local Advisory Boards (LABs), which represent other career services providers and provide advice and evaluation to Careers Scotland.

Even though the Duffner report crystallised the transitions-based vision regarding career services, this perspective seems to have already been present in the Scottish policy circles, as prior to the report the Scottish Executive provided GBP 9 million to the funding of All Age Guidance (AAG) services from the different local career service companies in 2001. Several projects were financed with the main objectives of raising 'awareness of and access to advice and guidance services' and improv-

³⁷ Italics added.

³⁸ This 'vertical approach', in which one category of services (*in casu* career services) is integrated across age groups, is opposite to England's 'horizontal' approach, in which different services are integrated per age group, with a focus on the youth (Watts, 2005, p. 8).

³⁹ The review was commissioned by Careers Scotland itself.

⁴⁰ The Welsh career service, which has also been devolved, was the first one in the UK to provide all-age services, although a recent review (*Careers Wales: A Review in an International Perspective. Research document 033/2009*, 2009) points at the fact that only 15% of its resources are allocated to adult services. In this framework, we decide to focus on the Scottish career services, as they have been evaluated more positively.

ing 'access and opportunities to raise skill levels and achieve full potential of people of all ages'.

The projects, consisting of the provision of IAG services, were positively evaluated: there was a 'significant shift from unemployment' into employment in the period following participation in the project. Furthermore, several respondents undertook training activities or changed jobs. The evaluation of the projects looked at the effects on people over 45 years of age, and found that the Interventions had improved their skills, confidence and employment prospects more than other age categories'. In addition, the evaluation provides qualitative evidence on the role of Careers Scotland in facilitating either forced or voluntary labour mobility at all ages (evaluation p. 50-60).

4. South East England's '40-70 Tomorrow's Workforce Programme'

The '40-70 Tomorrow's Workforce Programme' was undertaken by the South East England Development Agency, a public sector body created by the British government in 1999 to promote regional development. Its main guiding rationale was the need to reinforce older workers' activity and employability in the face of the demographic challenge that South East England would confront during the first decades of the 2000s.

The programme was composed of eight pilot projects, funded by a variety of sources, that ran between 2008 and 2010. The projects were focused, a.o. on promoting self-employment, training and career guidance among ageing workers, and had a variety of target groups, including the older long-term unemployed, older unemployed executives, older workers on short-time unemployment (maximum six months) and older people at work. Furthermore, some of them were driven by employers' needs, whereas others started from the needs of workers themselves. A remarkable feature is the fact that it defined 'older workers' starting from 40 years of age, as opposed to several other programmes. The duration of each worker's participation in the projects was short - maximum six months -, and the total number of beneficiaries was 3550.

The programme received an overall positive evaluation: it outperformed other existing active labour market policies in terms of job placement, and it did so in a more efficient way if the set up costs of the programme were not taken into account.

As most of the projects were focused on the long-term unemployed, a selection of the most relevant ones is provided below. More information about the remaining projects can be found in Wilson (2010).

- the **‘Skills for Security’** project took the requirements of employers (16 security firms) as its starting point, and was run by Skills for Security, the skills body of the security sector. It made use of brokerage to place older workers. The broker, who was specifically recruited for the project and who had himself experience in the security sector, helped to establish a network with employers and understand their needs, arranged state-funded training through a private provider and set up a system to screen candidates, who received both pre-employment orientation and employment-related training. In addition, he reached a deal with the PES (Job Centre) so that training could take place in a single block as opposed to a 16 hour per week basis. Candidates for placement were recruited through both the PES and the career guidance service agency for the South East. According to the evaluation, the main lesson learned from the project was the fact that industry-specific expertise on the part of the entity charged with placement (PES or, *in casu*, the broker) is crucial in order for the placement to succeed;
- the **‘Shape your Future’** project, which had 111 participants recruited from PES and other agencies, was run by a business support organisation, and was aimed at promoting self-employment among older workers. It consisted of group sessions where people were encouraged to reflect on their situation, business games were organised and participants were further referred to Business Link (the government’s business support service). Even though the project was not conducive to self-employment for all the participants (a quarter went back into employment, and ten moved into self-employment), it helped to boost workers’ confidence after or in the face of redundancy and to explore alternative ways of employment than the usually promoted ones (self-employment is not promoted by the PES);
- **Research to Get Results for Older Workers (ReGROW)** This project, which was part of the programme referred to above, was described by its evaluator as ‘one of the largest, (perhaps the largest), attempts to provide guidance to older workers ever conducted’. It was carried out by A4e, one of the main DWP contractors for training services,⁴¹ together with other training and career advice providers, and it aimed at providing training, career guidance and mentoring to individual workers, focusing on workers at Small and Medium Enterprises (SMEs). The project was entirely funded by the European Social Fund;
- ReGROW was implemented in close cooperation with the participating employers: upon an initial contact with the Employment Engagement Officers (EEO), recruited by the contractors, the employers identified potential participants to the project. Those participants received career advice from advisers employed by the partners. Training was subsequently provided on the basis of

⁴¹ A4e was also in charge of implementing significant parts of the Train to Gain scheme (cf. *supra*).

- the identified training needs, and if needed additional phone or face to face career guidance was provided throughout the training;
- the project was subject to an in-depth evaluation. Two of those evaluation's findings are relevant in the context of this report. First, satisfaction was high, both among employers and workers. Second, a third of the workers stated that participation in the project had increased the likelihood that they would stay longer in work and that they follow training. Furthermore, it improved the employees' self-confidence;
 - in spite of the positive results of the project, it is also worth noting that participants were mainly active in 'managerial, professional or administrative occupations' rather than manual ones, where reskilling of older workers may be more necessary in the face of restructuring. In addition, most of them had an NVQ level equal to or higher than 2, as opposed to the Train to Gain learners, who were recruited among the lower-qualified workers.

5. Firm-level practices

Contrary to the national level, at which no policies have been adopted to target older workers' mobility, some measures regarding internal mobility of workers have been taken at the enterprise level, yet without an 'age management' label⁴² (Lindley, Baldauf, & Galloway, 2011, p. 5). They are often studied under the conceptual umbrella of 'flexible retirement',⁴³ which may refer to:

- changes to the number of working hours or to working patterns;
- the possibility of combining pension income with income from a paid occupation, or increasing pension income by working longer;⁴⁴
- the possibility of adapting the contents' of one's job as to facilitate the transition to retirement, by means of, for instance, mentoring role.

Whereas the first two bullets above may of lesser interest to the Flemish government, it is worth elaborating on the third one:

- research has found that there are little companies with an 'official' internal mobility policy regarding older workers, but there is a widespread habit of listening to workers' request to flexible working;
- the above is mainly the case for larger companies, as they have a larger internal job market than smaller ones. No sector-level initiatives have been identified;

⁴² The firm-level approach is facilitated by the lack of collective bargaining at the sector and national levels.

⁴³ Likewise, in UK policy research labour flexibility is often understood in terms of flexibility *within* a job or *within* an employer (through for instance part-time work, job sharing, working at home, cf. McNair, Flynn and Dutton 2007, p. 7) rather than 'bridge employment', even if Vickerstaff (2007) relates the Government's 2005 emphasis on flexibility in 2005 to issues of bridge employment.

⁴⁴ Some measures allowing for this type of flexibility have been introduced at the national level.

- a respondent pointed out that, even though the British government has not undertaken any concrete mobility-related policy initiatives, it has facilitated the shift towards flexible retirement policies at the company level by bringing the topic on to the agenda by means of consultations with stakeholders.

The box below identifies a number of individual companies' good practices regarding internal mobility, obtained from secondary research materials.

Examples of internal mobility at the firm level in the United Kingdom

Dance school

Birmingham Royal Ballet (BRB) has established a comprehensive policy, aiming both at prolonging dancers' active lives and enabling them to make the transition towards alternative pathways, given the short duration of their careers (Lindley et al., 2011). The policy includes:

1. the establishment of medical facilities aiming at preventing injuries and addressing health issues, which have effectively lead to a considerable reduction in the number of injuries. The centre is also open for external clients, what provides supplementary income, and functions under strict rules of confidentiality (details on a dancer's health are not shared with BRB's management);
2. the creation of a Master of Arts (MA) in Dance studies, together with the University of Birmingham, to enable the transition from a performing to a non-performing career. It is worth noting that the programme's design pays attention to the fact that most dancers were rather physically than academically trained during their teenage years, as well as to the particular characteristics of their work, which make flexibility necessary regarding schedules, and entry and exit to and from the programme.

Even though the dance profession can be considered as an *unicum* along with other disciplines involving relatively short careers, such as high-level sports, its proactive or preventive approach, in which age issues are addressed early in a dancer's career, may offer inspiration to other branches in which physically intensive work prevents the development of long careers.

Telecommunications

Lindley, Baldauf and Galloway (2011, p. 8-56) identify a best practice approach within the British telecomm sector. Even though the company they analyze does not have measures which are specifically focused on age or elder workers, several of their HR policies have been noticed as good practice:

1. options for flexible retirement were introduced when early retirement came to be regarded as unsustainable. It included opportunities to work part-time or job share, reducing job responsibilities by taking a lower grade job, take

sabbaticals and secondments, and gradually reducing working hours and responsibilities. In addition, retirement planning courses have been provided in the past;

2. the company offers a Career Life Planning Tool to help both managers and employees to plan and accommodate career changes;
3. changing capabilities are managed, at any age, by a twofold approach. First, adjustment to the current job are discussed (e.g. in terms of ergonomics, equipment, working hours or reallocation of duties). Second, if such changes are not possible the company attempts to find an alternative job for the worker, and reskilling is considered as an option. New vacancies are prioritised for employees needing relocation before making them public.⁴⁵

Banking sector

In the framework of the closure of a business unit of a UK bank, a 'training bond' was established by the company and trade unions, by which the redundant workers' employability became the responsibility of the employer. Instead of engaging private training providers, the employer established links with local higher education institutes. In addition, ULRs became engaged to raise the level of employability.

⁴⁵ This approach towards new vacancies (i.e. 'ring-fencing' them for redeployment) was also noticed in a housing management company (Lindley et al., 2011, p. 77).

CHAPTER 5

CONCLUSION: THE ROLE OF LATE-CAREER MOBILITY IN UK POLICIES

From the overview provided above we can infer several features about mobility and late careers policy in the UK in function of the two main questions posed in the beginning of the paper.

In the first place, mobility may be almost entirely ascribed to the structural nature of the mobility regime. There is a general **lack of policies aiming directly at either external or internal mobility** during the last 20 years (cf. pension reforms). In spite of the fact that external late-career labour mobility in the UK is higher compared to that of other European countries, the state has had little or no bearing in bringing about those patterns during the last decades. Mobility can be thus considered an inherent characteristic of the British institutional regime.

The lack of late-career mobility-related policies in the United Kingdom is based on a fourfold rationale:

- the country's labour market is a structurally flexible one. This has as a consequence that job changes are not typically regarded as a problem. Characteristics such as the low level of employment protection legislation, low severance pay and a low age-earnings profile, act as the preconditions for longer working lives;
- the liberal character of the regime precludes the adoption and implementation of comprehensive measures directed at career steering such as the Dutch mobility pilots (cf. report Netherlands). The absence of sector- or nation-wide social partnership institutions in which employers' and workers' organisations collectively bargain constitutes a further impediment to such interventions, and generates considerable differences from firm to firm, and between unionised and not unionised workers.⁴⁶ Even if trade unions tend to favour collective bargaining solutions to issues such as employability and training (cf. Union Learning Representatives), the employers' vision, in which issues such

⁴⁶ For instance, unionised workers are more likely to receive training than non-unionised ones. It is also worth noting a respondent's observation on the fact that a lot of employer-led training takes place in individual firms, yet often according to the short-term needs of the firm and thus lacking a comprehensive career perspective.

as training and employability are the responsibility of the individual contractual relationship between employer and worker,⁴⁷ as well as the government's preoccupation with budget limitations have deterred the development of career policies similar to the ones from continental Europe;

- the British policy style precludes the adoption and implementation of measures specifically targeted at older workers.⁴⁸ In this sense, a respondent made repeated references to a 'horizontal' policy-making style, in which policies do not make distinctions across different groups and approach citizens rather as individuals with rights and responsibilities. This horizontal approach towards policies is related to the structural focus of British welfare policies on the most disadvantaged (cf. supra). With the exception of Careers Scotland, there is furthermore is no **cross-dimensional lifecourse perspective**. Age is only present in policies dealing specifically with age issues (e.g. pension reform);
- the persistent welfare-to-work focus present in the UK labour market policies during the last decades, in which considerable efforts were made to combat unemployment by means of large-scale programmes such as the New Deal in its different versions (cf. New Deal 50+), has left little policy space for the development of comprehensive career policies. In this sense, a respondent made a sharp distinction between policies aimed at putting as much people as possible into employment (quantity), which has been the main focus of British policies, and policies aimed at ensuring progression once a worker has a job, such as firm-specific training provision (quality). In this sense, DWP, which is in charge of employment policies, has tended to see training policies as a means to secure employment for a worker and has thus focused on the provision of job-search training rather than firm-specific or sector-specific training. The organisational divide between the two policy domains (they are spread across different ministries) makes the coordination of policies even more complicated.

In the above framework, concrete policies address the **employability of older workers indirectly** by means of subsidisation (ULR, Train to Gain) and exhortation (Age Positive campaigns) rather than on regulation or the collective provision of services by the public sector. Even in the case of ULR, interventions are aimed at boosting demand from the individual worker rather than providing a concrete service to him. This may have the undesired effect of creating self-selection (i.e. only employers who are already interested in, say, training will effectively become engaged).

⁴⁷ For a recent example of the employers' vision see their opposition to the right to request time off to train (Unionlearn, 2010).

⁴⁸ This is evident from an analysis of the Opportunity Age strategy (cf. supra), which lacks a true cross-dimensional focus on older workers.

Table 6.1 Mobility and worklife-enhancing policy instruments in the Netherlands

Type of instrument	Institutional filter				Barrier addressed
	Employment relations system	Occupational system	Employment sustaining policy	Pension system	
Nodality			Age Positive Shape your future ReGROW		Discrimination Lack of training and self-confidence Lack of training
Authority	Anti-discrimination legislation			Pension reform	Financial disincentives to change jobs
Treasury		Train to Gain ULR Skills for Security Shape your future			Lack of training
Organisation		Careers Scotland	Careers Scotland		Lack of training

Table 6.1 summarises the policies that bear some influence on older workers in terms of the project's typology.

When the measures are assessed from the perspective of the project's theoretical framework (cf. WP1), it becomes clear that instrument choice is strongly embedded in the British liberal institutional framework: services provision by the government is rather limited, and with some exceptions (pension reform, Age Discrimination Legislation) government interventions are aimed at influencing behaviour indirectly by altering the incentives provided to individuals rather than influencing that behaviour directly through constraining societal actors into a certain behavioural pattern.

Even if these institutional path dependencies should make us cautious when looking at the transferability of measures such as private sector-led training provision to a Flemish and Belgian context, they do teach us some very valuable policy lessons. These lessons are summarised in the box below.

POLICY LESSONS FROM THE UNITED KINGDOM

Given the embedded or 'systemic' nature of mobility in the United Kingdom, it is difficult to select transferrable best practices. However, several policy lessons can be drawn from the British experience:

1. even if mobility is not a policy priority and it is not evaluated as such, the availability of data allows external actors (i.e. researchers, the social partners) to analyze mobility patterns, as illustrated by the British Household Panel Survey, which has been used to measure changes in external mobility in response to economic change (Golsch e.a.) and pension reforms (Andrietti, Disney and Emmerson);
2. mobility is not a necessary condition for longer working lives: the fact that after the UK's pension reform most workers remained in their jobs is illustrative thereof. Such a consideration should be taken into account when assessing the impact of the reform of early retirement systems in Belgium, although a note of caution is necessary in the case of heavy occupations, where workers are unlikely to remain in employment until pension age;
3. even if policies are not adopted with the specific goal of either promoting late-career mobility or extending working lives, they can still possibly have effects in terms of the two phenomena, as was the case of the Train to Gain and Apprenticeships schemes (cf. theoretical framework, unintended consequences). In this sense, it is useful that policy evaluations differentiate across age categories even if the policies have not been designed with age objectives in mind. Although such differentiation does not imply a detailed overview of either late-career activity or mobility, it can provide rough proxies that will serve as a basis for further analysis;

4. dealing with ageing is neither the prerogative nor the exclusive obligation of the state. In this sense, the proactive position adopted by the trade unions points at the importance of the social partners when designing and implementing labour market policies was crucial for the success of ULR. Given the difficulties to reach the older age groups, trade unions become extremely important partners in order to reach older workers. This is certainly of interest for the most unionised sectors such as the heavy industry, which tend to be more exposed to forced mobility. In this context, the Belgian sector funds can be seen as a possible functional equivalent for ULR. However, such an approach may generate inequalities between unionised and non-unionised sectors and SMEs;
5. the fragmentation of competences across different government instances, such as the case of career guidance and labour market policies, may be detrimental to a unified policy vision with regard to lifecourse approaches, as it is shown by the division between DWP and BIS regarding labour market and career guidance policies and the lack of attention for the role of the public employment services. In this sense, strong coordination mechanisms should be put in place before. At the same time, decentralisation may be an opportunity for fruitful policy-learning and innovation, as shown by the example of Careers Scotland;
6. policy objectives in terms of older workers' employment may be reached both by targeted and non-targeted approaches;
7. a large degree of activity does not correlate perfectly with a context in which 'positive transitions' are the norm. In other words, job quality should be as a concern of policy as much as job quantity if the 'making transitions pay' is to be translated into concrete initiatives;
8. in order to ensure a regime of positive transitions, there is a strong interplay between the 'hard' institutional regime in which the basic incentives for working longer – pensions, employment protection legislation, individual responsibility for training – and the 'soft' measures and the 'soft' measures, often adopted at lower levels (such as sectors) aiming at enabling workers to move across jobs. In this sense, the lacunae left by the absence of a true social partnership in the UK may be filled in Belgium by the interaction of social partners and government at the local, sector, regional and national levels.

ANNEX

LIST OF RESPONDENTS

Name	Organisation	Date of interview	Type of interview
Stephen McNair	National Institute of Adult Continuing Education	03/11/2011	Telephone
Philip Taylor	Monash University	18/01/2012	Telephone
Sarah Vickerstaff	University of Kent	30/01/2012	Telephone
Sally Brett	Trade Unions Congress	06/02/2012	Face-to-face
Richard Exell and Helen Nadin	Trade Unions Congress	07/02/2012	Face-to-face
Hilary Metcalf	National Institute for Economic and Social Research	07/02/2012	Face-to-face
Malcolm Small	Institute of Directors	08/02/2012	Face-to-face
Iain Murray	Trade Unions Congress	08/02/2012	Face-to-face
Bill Wells	Department for Business, Innovations and Skills	10/02/2012	Face-to-face
Stephen Balchin	Department for Work and Pensions	20/02/2012	Telephone

REFERENCES

- Andrietti, V. (2001). Occupational pensions and interfirm job mobility in the European Union. Evidence from the ECHP survey. Turin.
- Andrietti, V. (2003). Pension choices and job mobility in the UK. Madrid.
- Anxo, D., Guillemard, A.-M., Ericson, T. & Jolivet, A. (2011). Transitions from work to retirement: still a maximum of diversity in a minimum of space. Retrieved March 30, 2012, from http://www.aspa-eu.com/Publications/Deliverables/ASPA_Wp2_wp3_IntroductoryComparativeChapter_30Jun11.pdf
- Atkinson, J. (2001). Evaluation of the New Deal 50plus: Research with Individuals (Wave 2). Brighton.
- Brooks, C. (2011). The impact of the age regulations five years on. London.
- Bruggeman, F. & de Lavergne, F. (2010). *European restructuring toolbox*. Brussels.
- Buchholz, S., Hofäcker, D. & Blossfeld, H.-P. (2006). Globalisation, accelerating economic change and late careers. A theoretical framework. In H.-P. Blossfeld, S. Buchholz & D. Hofäcker (Eds.), *Globalisation, uncertainty and late careers in society* (p. 1-24). Abingdon: Routledge.
- Careers Service Review Committee. (n.d.). *Report*.
- Careers Wales: A Review in an International Perspective. Research document 033/2009. (2009).
- Casey, B. H. & Li, Y. (2010). Working Beyond Retirement Age: what we know and what we don't. *Labour Force Survey User Meeting*. London: Royal Statistical Society.
- Clasen, J. & Clegg, D. (2003). Unemployment Protection and Labour Market Reform in France and Great Britain in the 1990s: Solidarity Versus Activation? *Journal of Social Policy*, 32(3), 361-381.
- Comptroller and Auditor General. (2009). *Train to Gain: Developing the skills of the workforce*. London.
- Culpepper, P. D. & Thelen, K. (2008). Institutions and Collective Actors in the Provision of Training: Historical and Cross National Comparisons. In K. U. Mayer & H. Solga (Eds.), *Skill formation. Interdisciplinary and cross-national perspectives* (p. 21-49). Cambridge: Cambridge University Press.
- Disney, R. & Emmerson, C. (2002). Choice of pension scheme and job mobility in Britain. Nottingham.

- European Commission. (2007). *Employment in Europe 2007*. Brussels.
- European Commission. DG Employment Social Affairs and Equal Opportunities. (2010). Indicators for monitoring the Employment Guidelines including indicators for additional employment analysis. 2010 compendium. Brussels: European Commission.
- Finegold, D. & Soskice, D. (1988). The failure of training in Britain: analysis and prescription. *Oxford Review of Economic Policy*, 4(3), 21-53.
- Finn, D. (2005). The role of contracts and the private sector in delivering Britain's 'employment first' welfare state. In E. Sol & H. Mosley (Eds.), *Contractualism in employment services: a new form of welfare state governance*. (p. 101-117). The Hague: Kluwer Law International.
- Golsch, K., Haardt, D. & Jenkins, S. P. (2006). Late careers and career exits in Britain. In H.-P. Blossfeld, S. Buchholz & D. Hofäcker (Eds.), *Globalisation, uncertainty and late careers in society2* (p. 183-210). Abingdon: Routledge.
- Grubb, W. N. (2004). The Anglo-American approach to vocationalism: the economic roles of education in England. Oxford and Warwick.
- Grugulis, I. (2003). The Contribution of National Vocational Qualifications to the Growth of Skills in the UK. *British Journal of Industrial Relations*, 41(3), 457-475.
- Hope, C. & Winnett, R. (2011). Give firms freedom to sack unproductive workers, leaked Downing Street report advises. *The Telegraph*. London.
- Hoque, K. & Bacon, N. (2011). Assessing the impact of Union Learning Representatives on training: evidence from a matched sample of ULRs and managers. *Work, Employment and Society*, 25(2), 218-233.
- Johnson, S., Sawicki, S., Pearson, C., Lindsay, C., McQuaid, R. W. & Dutton, M. (2009). *Employee Demand for Skills: A Review of Evidence & Policy. Evidence report 3*. South Yorkshire.
- King, D. (1995). *Actively Seeking Work? The Politics of Unemployment and Welfare Policy in Great Britain and the United States*. Chicago: Chicago University Press.
- Lindley, R., Baldauf, B. & Galloway, S. (2011). National Report: United Kingdom. Report on organisational case studies. Warwick.
- Lluberias, R. (2008). The Effect of Pensions on Job Mobility: Empirical Evidence for the UK. Montevideo.
- Manning, A. (2005). *You Can't Always Get What You Want: The Impact of the UK Jobseeker's Allowance*. London.
- McCormick, B. & Hughes, C. (1984). The influence of pensions on job mobility. *Journal of Public Economics*, 23(1-2), 183-206.
- McNair, S., Flynn, M., Owen, L., Humphreys, C. & Woodfield, S. (2004). *Changing work in later life: a study of job transitions*.
- Meally, F. & Pudney, S. (1996). Occupational pensions and job mobility in Britain: estimation of a random-effects competing risks model. *Journal of Applied Econometrics*, 11(3), 293-320.

- Meghir, C. & Whitehouse, E. (1997). Labour market transitions and retirement of men in the UK. *Journal of Econometrics*, 79(2), 327-354.
- Metcalf, H. & Meadows, P. (2010). Second survey of employers' practices and preferences relating to age, 2010. Employment Relations Research Series No. 110. London.
- Newton, B. (2009). Train to Gain and low-skilled older adults: news from the front line. *Employment Studies No. 9*, 2-3. Brighton.
- OECD. (2004). *OECD Employment Outlook. Outlook*. Paris: OECD Publishing.
- OECD. (2008). Employment Protection in the United Kingdom - 2008. Retrieved March 30, 2012, from <http://www.oecd.org/dataoecd/26/48/42746803.pdf>
- OECD. (2011). Pensions at a glance 2011. Retirement-income systems in OECD and G20 countries. Pensions. Paris: OECD Publishing.
- OECD. (2012). OECD Factbook 2012. Retrieved April 5, 2012, from http://www.oecd-ilibrary.org/economics/oecd-factbook-2010_factbook-2010-en
- OECD Statistics. (n.d.). Retrieved April 2, 2012, from <http://stats.oecd.org/>
- Older People and Society Division. (2009). Report on implementation of Opportunity Age commitments. London.
- Opportunity Age*. (2005). London: HM Government.
- Ross, C., Kumarappan, L., Moore, S. & Wood, H. (2011). Learning Journeys. Trade union learners in their own words. London.
- Schmelzer, P. (2011). Unemployment and occupational mobility at the beginning of employment career in Germany and the UK. Nuremberg.
- Schmidt, V. (2001). The politics of economic adjustment in France and Britain: when does discourse matter? *Journal of European Public Policy*, 8(2), 247-264.
- Scottish Executive. (2005). Evaluation of the All Age Guidance Projects. Edinburgh.
- Smeaton, D. & McKay, S. (2003). Working after State Pension Age: Quantitative Analysis. Norwich.
- Smeaton, D. & Vegeris, S. (2009). Older people inside and outside the labour market: a review. Research report 22. Manchester.
- Sorensen, A. B. & Tuma, N. B. (1981). Labor market structures and job mobility. In D. Treiman & R. Robinson (Eds.), *Research in Social Stratification and Mobility: An Annual Compilation of Research* (p. 67-94). Greenwich, Conn: JAI Press.
- Steinman, S. (n.d.). The vocational Education and Training System in England and Wales. *International Journal of Sociology*, 28(4), 29-56.
- Stuart, M., Cook, H., Cutter, J. & Winterton, J. (2010). Evaluation of the Union Learning Fund and unionlearn. Preliminary findings. London.
- TUC Equality Audit 2009. (2009). London: TUC.
- TUC & CIPD. (2011). *Managing age. New edition 2011*. London: Chartered Institute of Personnel and Development.
- Unionlearn. (2010). Right to training is on the right track. London: TUC.

-
- Van Oorschot, W. (2000). Who Should Get What, and Why? On Deservingness Criteria and the Conditionality of Solidarity among the Public. *Policy and Politics*, 28(1), 33-48.
- Venn, D. (2009). Legislation, collective bargaining and employment: updating the OECD employment protection indicators. Paris.
- Vickerstaff, S. (2007). What do older workers want? Gradual retirement? *Social & Public Policy Review*, 1(1).
- Watts, A. G. (2005). Progress and potential. A review benchmarked against the OECD Career Guidance Policy Review. Glasgow.
- Wilson, N. (2010). 40-70 Tomorrow's Workforce Programme. Making the most of opportunities for older workers in the South East. Surrey.
- Wood, H. & Moore, S. (2005). An evaluation of the UK Union Learning Fund - its impact on unions and employers. Final report, June 2005. London.