



European Commission
DG Employment
Social Affairs and
Equal Opportunities



Fondazione Giacomo Brodolini

activeage

Evaluating active ageing policies in Italy: an innovative methodological framework

VP/2008/006/14

FINAL REPORT



Agenzia Liguria Lavoro
Ente strumentale della Regione Liguria



**Agenzia
della Campania
per il Lavoro**



**REGIONE MARCHE
ITALIA**

TABLE OF CONTENTS

1. ORIGINS AND CONTENTS OF THE PROJECT	3
2. THE FIELD OF REFERENCE: DEMOGRAPHIC AGEING AND THE MAIN POLICY CHALLENGES	4
2.1 Main demographic trends in Italy and Europe	4
2.2 Active ageing policies within the framework of international policy	6
2.3 Active ageing in Italy: the main lines of action	7
2.4 Analysis of Italian best practices: regional mapping of active ageing policy measures implemented	12
3. ACTIVE AGEING: TOWARDS A MULTIDIMENSIONAL INTERVENTION STRATEGY	19
4. THE MODEL FOR EVALUATION OF ACTIVE AGEING POLICIES: AN INTEGRATED APPROACH	22
5. APPLICATION OF THE MODEL IN THREE REGIONAL ENVIRONMENTS: SUMMARY OF THE MAIN RESULTS	24
Regione Liguria	25
Regione Marche	27
Regione Campania	29
6. SOME GENERAL POINTS AND IMPLICATIONS FOR PROGRAMMING	31
 Main bibliographical references	 34

1. ORIGINS AND CONTENTS OF THE PROJECT

The research project “*Evaluating active ageing policies in Italy: an innovative methodological framework*” is promoted by the Fondazione Brodolini and funded by the European Commission – DG Employment and social affairs in the area of activities to evaluate the European Employment Strategy (EES).

The aim of the project is to define and experiment a purpose-made methodology and set of indicators serving for integrated evaluation of the active ageing policies implemented in Italy in the light of the objectives set by the EES.

In fact, the EES includes among its priorities increasing the rates of participation of the older workforce, and thus implementing actions serving to prolong working life, but also preventing and curbing those processes of social exclusion that may be associated with age.

In particular, the project pursues the following aims:

- promoting an integrated approach to the monitoring and implementation of active ageing policies
- formulating a methodological structure providing for integrated evaluation of all the active ageing strategies deployed in the various areas and their contribution to the overall objective
- applying this model in the territory of the three Regions
- communicating the results to the various parties involved.

The project has seen activation of an inter-regional partnership involving the Regione Marche, the Regione Campania and the Regione Liguria (Agenzia Liguria Lavoro).

2. THE FIELD OF REFERENCE: DEMOGRAPHIC AGEING AND THE MAIN POLICY CHALLENGES

2.1 Main demographic trends in Italy and Europe

The EU, and especially Italy, is facing significant demographic changes posing a threat to the sustainability of its social security systems and to its overall macro-economic performance, due to a combination of several underlying trends: the drastic drop in the birth rates after the baby boom of the 50s and the 60s (the crude birth rate in Italy was 9.623% in 2008, below the EU27 average of 10.869%), low fertility rates (1.53 births/woman on EU27 average and 1.35 in Italy in 2006, are below the replacement rate of 2.1 needed to maintain the current population, disregarding migration contribution) and increasing life expectancy at birth for both males and females (respectively 78.50 and 84.20 years in Italy in 2006, always above the EU27 and OECD averages; see Figure 1 for recent trends in the main demographic indicators)¹. The latter is commonly driven by the improvement in living and health conditions and medical innovation, while the first two factors are the result of cultural and socio-economic processes involving the family, the role of women in society, the labour market and other distinctive features of the Italian landscape, such as the lack of suitable and efficient social and care services, and late adulthood and the resulting delay of parenthood and marriage in a country where 90% of all births take place within families of married couples (70% in the rest of Europe; ActiAge, 2004).

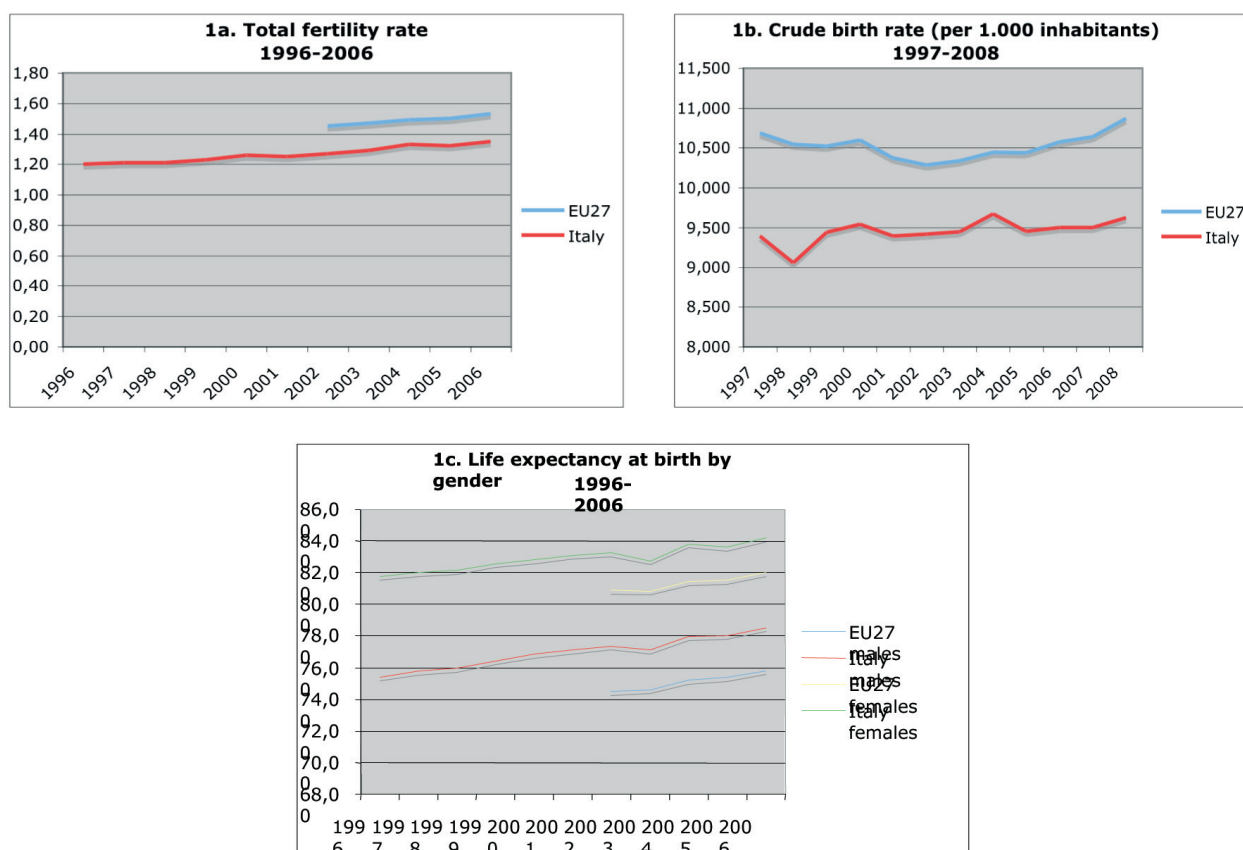
The demographic ageing process is expected to produce dramatic changes in the size and structure of the European population, particularly affecting its workforce. The proportion of mature age classes is growing in each EU Member State and especially in Italy, where the share of over 64-year-olds in 2008 was the highest (20% of total population), with the exception of Germany (20.1%), and is expected to reach 32.7% in 2060. All of the remaining age groups experienced a long-term declining trend in the last 20 years, especially the central age group of the demographic break-down (the “active” population category: 15-64 years old) with the exception of the 25-49-year-old sub-group, showing a slight increase since 1997 in Italy (up by 0.3% in 10 years).

Demographic changes are also deemed to affect the size of the overall working age population (aged 15-64 are expected to decrease by 11.2% in EU27 and by 10.9% in Italy between 2008 and 2060) as well as its structure, following the different developments of the cohorts in the working age sub-groups.

The dependency ratio (Older Dependency Index – ODI – is defined as the share of people aged 65 years and older in comparison to those of working age) in EU27 and Italy is expected to rise respectively from the

1 Eurostat website statistics (July 2009).

Figure 1. Main demographic indicators: Italy and EU27 compared



Source: Eurostat (July 2009)

current 25.3% and 30.4% to 38.4% and 27.44% by 2030, and to reach 53.47 and 59.32% by 2060. The result of this trend is that by 2060 we will have less than two people of working age for every person aged 65 and over, as against the four to one we now have.

As a consequence of changes in the size and structure of the working age population, some EU Member States are expected to face greater challenges in terms of workforce availability. Italy, among other countries (Czech Republic, Germany, Hungary and the three Baltic States) is not even enjoying the temporary moderate increase in the working-age population over the medium term experienced in other Member States (expected to persist until 2010), but is already facing a decline in the proportions of the 15-64 age group.

2.2 Active ageing policies within the framework of international policy

The issue of demographic ageing has consequently taken on increasing importance in both the national and international agenda over the last twenty years. As from the first World Assembly on Ageing held in Vienna in 1982, the United Nations has taken a keen interest in the issue of active ageing, stressing the multi-dimensional nature of the topic and approving an International Plan of Action on Ageing (UNO resolution 37/51) with the aim of locating strategies and policies to address demographic ageing within a general frame of reference.

With the same spirit there followed, in 1991, UNO Assembly adoption of the document containing Principles for Elderly People, and in 1994 the Cairo International Conference on Population and Development. In 1999 UNO promoted the International Year of the Elderly, based on the theme “A society for all ages”, pointing up the need to address issues of ageing within a perspective taking in the entire lifespan within the broader context of social development. Finally, the Second World Assembly on Ageing, held in Madrid in 2002, saw the approval of a second Plan of Action encouraging a participative strategy in access to learning, education and training, and indeed in cultural, economic, political and social life for the elderly, as a means to overcome social isolation and support responsabilization.

Within the framework of the UNO directives, the European Parliament and Commission have collaborated on definition of a common strategy since the 1980s with national series of acts of Parliament and the approval of 11 Member States of the Community Charter of the Fundamental Social Rights of Workers, clauses 24 and 25 of which extend protection to elderly workers and pensioners. The 1990s saw a succession of various initiatives (first programme of action for the elderly 1991-93, European Year of the Elderly and Solidarity between Generations of 1993 and the White Paper on Social Policy in 1994) culminating with the document Towards a Europe for All Ages (COM (1999) 221), which represents the frame of reference for political action at the Community level in relation to the topic of population ageing, also pointing up the multi-dimensional nature of the issues as well as the gender dynamics involved. Emphasis on the work aspects of active ageing is constant throughout the document, and is further stressed in the report submitted by the Commission to the European Council of Stockholm in 2002, Increasing Labour Force Participation and Promoting Active Ageing (COM (2002) 9 final).

The central importance of the impact of the demographic ageing process on employment in the political debate and in public opinion in Europe finds expression in the objectives of Stockholm 2001 (at least 50% of the Europeans between 55 and 64 years of age must be employed by the end of 2010) and Barcelona 2002 (effective retirement age must be extended throughout the European Union by at least 5 years by 2010), both concerning the issue of employment of the elderly population. Again, the year 2002 saw the European Commission adopt the document “Europe’s Response to the Ageing of the World Population: Promoting Social Progress in an Ageing World” (COM(2002) 143), which opens up the scope of intervention, reconfirming the need for a political strategy covering the economic, employment and also social aspects, and looking to an intergenerational approach.

In general, the prevalent strategy at the Community level appears to be oriented towards active policies and practices including the quality of life and social integration of the elderly, while retaining the focus on the economic, employment, welfare and health aspects.

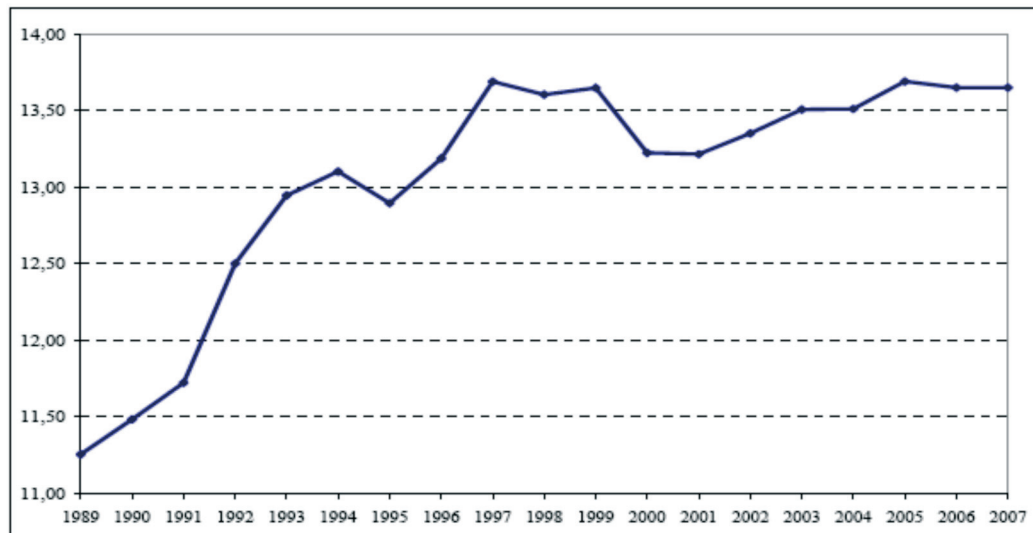
2.3 Active ageing in Italy: the main lines of action

Consistently with the European trend, Italian policy initiatives in the active ageing domain consist primarily of welfare regulation reforms aimed at extending working life combined with few labour market measures indirectly targeting mature workers. More in detail, active ageing policies in Italy have involved three policy domains in particular: the welfare system, labour market participation, and lifelong learning and continuous training.

Pensions and social security reforms have been a national political priority and dominated thinking about active ageing since the beginning of 1990s, mostly with the aim to ensure financial sustainability for the social security system in the long term, the development of supplementary pension schemes and progressive unification of the basic rules of a previously fragmented statutory pension system. Five major pension reforms followed upon one another in a 15-year period of time:

- 1992 Amato Government Reform (D. Lgs. 503/92);
- 1995 Dini Government Reform (Law 335/95);
- 1997 Prodi Government Reform (Law 447/97);
- 2004 Berlusconi Government *Legge Delega* (243/04);
- 2007 Prodi Government “*Protocollo su previdenza, lavoro e competitività per l’equità e la crescita sostenibili*”.

The Amato Government launched a series of progressive reforms of the Italian pension system in 1992, raising retirement age (from 60 to 65 for men and from 55 to 60 for women) and the number of years of contributions for eligibility for seniority pensions (35 years). The key element of the Amato Government pensions reform was the change in the indexing of benefits, to consumer prices instead of the minimum wage. The structural impact of the Amato Government measure is demonstrated by the trend in the pension expenditure/GDP ratio over the past 18 years shown in Figure 2.

Figure 2. Pension expenditure/GDP ratio (1989-2007)

Source: Italian National Strategy Report on Social Protection and Social Inclusion 2008-2010

The ratio trend tended to stabilize during 1997-2007, moderate fluctuations since the year 2000 being associated with a slowdown in GDP growth.

One of the most radical measures of the whole reform process was the 1995 Dini Government law n. 335, which set the retirement age at 57 years or, alternatively, after having completed 40 years of contributions, and introduced a new pensions calculation system for a gradual shift from the *defined-benefit scheme* to a *notional defined-contribution scheme* based on the principle of actuarial fairness (equality of the internal real rate of returns from social security for individuals that only differ in their retirement age), applied fully to all entrants in the labour market as from 1996. Under the new system, benefits are calculated on the basis of the amount of contributions paid throughout the entire career capitalised at the average GDP growth rate over the previous five years and converted into an annuity on the basis of a factor reflecting life expectancy at the time of retirement.

Other provisions introduced by the 1995 reform aimed at the harmonization of pension schemes pertaining to different categories and equalised public and private schemes. The new system is being implemented over a long transitional period: the Dini reform provisions entirely have full effect for workers starting after 1996, while to those with more than 18 years of contributions at the end of 1995 apply the pre-Amato pension benefits calculation systems. For all the other workers, pension procedures are weighted by the number of contribution years under the three different systems. Given the extensive time span of the Dini reform transitional period of implementation (benefits will become fully effective only after 2030), in 1997 the Prodi Government expedited harmonisation of the public and private pension systems, and finally put an end to the phenomenon of the so-called “baby pensioners” (those with a number of years of contributions for eligibility for seniority pensions lower than 35 years) with the aim to stabilize public expenditure in the short term.

In 2004 the Berlusconi Government undertook a new pension reform, later on amended in order to soften its implementation effects, as part of the 2008 budget process, and again raised retirement age: by 2013, the minimum age to apply for early retirement will increase from 57 to 61 and 62 years, respectively for employees and self-employed, even if early retirement is still possible at any age with 40 years of contributions.

Incentives for workers to retire later are in place for women, who have the right to work until 65 years of age (the male retirement age). Retirement is not mandatory at pensionable age despite the possibility for employers to dismiss employees. The combination of employment and old-age pension receipts is now possible both for pensioners with 40 years or more of seniority and for those aged 65 plus in the case of men or 60 plus for women.

Participation in the supplementary occupational system created in 1993 (open funds and closed collectively agreed funds) is still low (11% of employees). The 2007 Finance Act anticipated the provisions of the 2004 and 2005 pension reforms (Law 243/04 and 252/05) with respect to the implementation of the second pillar through the introduction of higher fiscal incentives and a new mechanism for the transfer of career-end severance pay (*Trattamento di Fine Rapporto*, TFR) to a private pension fund (unless the worker explicitly refuses it, the TFR is automatically transferred). In any case, registration in the private pension scheme remains on a voluntary basis.

Despite the structural effects on the long-term financial position of the social security system, the pension reforms have failed to moderate total expenditure. Pension expenditure accounts for 30% of the total budget - the largest share of total public spending in OECD countries (16% on average). Public expenditure on old age and survivors' benefits is also the highest among the OECD countries (14% of GDP), well above the OECD average (7.2%). This is mostly due to postponement of adoption of the new transformation coefficients and to the gradual introduction of reform measures, which excluded workers with 18 years of contributions at the end of 1995.

With respect to the progress towards the Barcelona target (a progressive increase of about five years in the effective average retirement age by 2010), the whole process of welfare system reforms seems to have moderately affected the pre-existing Italian profile as the effective average retirement age in 2007 was 13 months below the EU 15 average (10 months below compared to EU27 averages) and it only increased by 7 months in the 6-year interval observed (2 month increase less than EU15 average).

In terms of gender, Italy actually showed a decrease in terms of effective average retirement age over the time interval, as women experienced a reduction of their working life by 6 months (although in 2003 the average retirement age was higher than that of men).

Labour market reforms carried out in the past 20 years affected on one hand the management and typology of Employment Centres, improving public structures and allowing for private providers, and on the other hand the introduction of non-standard and more flexible labour contracts.

With regard to the former strand of policy actions, although older workers represent a priority target group of public Employment Centres, less than 30% of them launched specific activities for the target group in the first part of the decade 2000-2010 (CNEL, 2006). Employment Centres targeting older workers are unequally distributed across the country (less than 7% in Sicily and Sardinia, 20% in the north-east, 30% in the centre-south and 48% in the north-west), and mostly implement training or placement projects in response to specific enterprise crises without a strategic intervention plan.

The introduction of flexible labour contracts began in 1997 with law n. 196 (the so-called “Pacchetto Treu”) and has found support in the general assumption that more flexible forms of employment (employment for specific projects or accessory work) can favour demand and open the way to matching on the labour market, especially for mature workers.

The so-called “Biagi law” (law n. 30/2003) and its implementing decree (n. 276/2003) explicitly identify the over-50 age class, unemployed or at risk of unemployment, as a target group among other disadvantaged categories. The measure encourages the access of older workers to the labour market through a set of specific terms and provisions: the “hiring contract” (arts. 54-60), the possibility to sign “discontinuous” employment contracts (“contratti intermittenti”) for over 45-year-olds unemployed and registered at employment agencies (arts. 33-40), and more general incentive measures for over 50-year-olds and other disadvantaged groups (art. 13). The “hiring contract” promotes entry of disadvantaged categories into the labour market through economic incentives to the firms participating and its term ranges from a minimum of 9 to a maximum of 36 months.

The Government Decree - 9th of July 2003, implementing the European directive 2000/78/EC, introduced the equal treatment principle in the labour market in Italy, against any discrimination, including age-based.

In the framework of the July 2007 Welfare Protocol, the job seekers’ allowance was extended to 12 months for over 50-year-olds.

Another measure only indirectly targeting older workers is law n. 266/1997, providing incentives for the employment of dismissed managers (often over 45 years old) by enterprises with fewer than 250 employees.

The Italian Regions are committed to the goal of employability for older workers in the framework of the 2007-2013 European Social Fund Regional Operational Programme which entails ?298 million to be allocated over a 7-year period (Inter-Ministerial Committee for EU Affairs, 2008). Investigation into Regional planning in the domains of both employability and welfare policy based on a sample of 3 regions located in different areas of the country shows that the situation of workers over 45 years old is not being directly addressed but still only indirectly considered (Mirabile, 2009).

The effect on mature workers of the recent legislative developments regarding Italian labour market employment is still mixed. With respect to progress towards the Stockholm target (at least 50% of the EU population aged 55-64 should be employed by 2010), the employment rate of over 54-year-old workers was amongst the last 6 in EU27 in 2008 (only ahead of Hungary, Luxemburg, Malta, Poland and Slovenia) although the EU27, EU15 and the Euroarea averages are approaching the target (see Table 1). The positive increase during the time interval observed (+ 22.8%) is consistent with the European trend and involves both fixed- and non-fixed-term workers with a sharper rise in employment for women (Mirabile, 2009). Nevertheless, the progressive increase in the average age of flexible positions (although they represent only 5% of total employment) is also assumed as a proxy of the growing employment instability of older worker age classes.

Table 1. Employment rate of older workers, 55-64 years old (%)

	2001	2002	2003	2004	2005	2006	2007	2008
EU27	37.7	38.5	40	40.7	42.3	43.5	44.7	45.6
EU15	38.8	40.2	41.7	42.5	44.2	45.3	46.5	47.4
Euroarea	35.2	36.5	37.9	38.7	40.6	41.8	43.3	44.4
Italy	28	28.9	30.3	30.5	31.4	32.5	33.8	34.4

Source: Eurostat (July 2009)

The promotion of continuous training for older and low-skilled workers was a key objective of the 2005 review of the Lisbon Strategy and of the accordingly revised European Employment Strategy, and is a fundamental component of the Italian lifelong learning strategy in accordance with the Italian National Reform Programme 2008-2010. Moreover, 83.7% of the major Italian active ageing projects surveyed in the attached “Best Practices Analysis Report” explicitly target the lifelong learning dimension of active ageing, in all cases in combination with other dimensions (vertical integration), and mostly as part of an active labour policy (70.8% of lifelong learning cases examined; see the “Best Practices Analysis Report” for details).

The policy effort at the national and local level is still not translating into an adequate supply of training and education for adult workers, comparable with European standards in terms both of enterprise provision and of active and mature population participation.

According to the Eurostat *Continuing Vocational Training Survey* (reference year 2005)², only 32% of the Italian enterprises provide continuous training to their employees, 28 percentage points below the European average.

As detailed in Table 2, a smaller share of the active Italian population (6.3%) participate in lifelong learning activities compared to the EU27 average (9.6%), and barely half of the EU15 average. During the 2000-2008 time interval, the gap separating the Italian from the European averages also increased as the Italian percentage of adult population grew at a slower pace (+1.5% compared to +3.1% in the Euro area, +3% in EU15, and +2.5% in EU27).

Table 2. Adult population (25-64) participating in education and training (%)

	2000	2001	2002	2003	2004	2005	2006	2007	2008
EU27	7.1	7.1	7.2	8.5	9.3	9.8	9.7	9.5	9.6
EU15	8	8	8.1	9.8	10.7	11.3	11.2	10.9	11
Euroarea	5.4	5.2	5.3	6.5	7.3	8.2	8.2	8.4	8.5
Italy	4.8	4.5	4.4	4.5	6.3	5.8	6.1	6.2	6.3

Source: Eurostat – Labour Force Survey (July 2009)

2 www.cedefop.europa.eu/etv/projects_networks/Statistics/indicators_continuing.asp.

Furthermore, the Isfol *Indaco-Lavoratori* survey³ on training attitudes and behaviours of workers in Italy shows that the 45-54-year-old and over 55 age classes are the most excluded from continuous training activities of all the typologies of workers (see Table 3), especially in the public sector. In general, the participation of the active population in lifelong learning activities tends to dwindle among the older age classes and lower-skilled profiles (Ministero del Lavoro e delle Politiche Sociali/Isfol, 2006).

Table 3. Participants in continuous training activities per age class and typology of worker (%)

	TYPOLOGY OF WORKER			AVERAGE
	PRIVATE SECTOR	PUBLIC SECTOR	SELF-EMPLOYED	
Average	26.7	53.1	27.6	32.7
<i>Age class</i>				
25-34	31.4	59.5	33.8	36.2
35-44	27.6	52.8	29.7	34.2
45-54	23.2	54.1	26.9	33.4
Over 55	26.6	45.4	21	28.8

Source: Isfol, "Indagine sulla conoscenza – Atteggiamenti e comportamenti dei lavoratori verso la formazione continua", 2005

2.4 Analysis of Italian best practices: regional mapping of active ageing policy measures implemented

The Best Practices Analysis Report provides a detailed overview and analysis of existing programmes, plans and projects concerning active ageing in Italy, the aim being to map the instruments and tools developed at the local level (municipalities, provinces and regions) and see how these actions can be integrated to achieve the active ageing goals.

The main source of information and data used is the "National Catalogue of Best Practices" promoted by the Italian Ministry of Labour and Social Security, a collection of actions implemented within the ambit of the European Social Fund, the Operational Programmes (both national and regional), the Equal Community Initiatives, the "Innovative Actions" envisaged by the art. 6 of the Re. EC n. 1784/99 and the Leonardo da Vinci Community Programme. The overview thus focuses mainly on projects that have been already identified as national or local best practices.

The set of actions surveyed comprises 29 Italian best practices. The main characteristics of each project are collected and arranged according to a "Best Practices Description Form" divided into 3 main sections: the first section (*Section A – Best Practices Identification*) is devoted to identification of the project financing and implementing bodies, the area (rural, urban or other areas) and period of implementation, the active ageing dimension targeted (employability, lifelong learning, health and quality of life, transportation and mobility,

3 Isfol, "Indagine sulla conoscenza – Atteggiamenti e comportamenti dei lavoratori verso la formazione continua"; Ministry of Labour and Social Policies/Isfol (2006).

and active citizenship) and the policy level (regional, inter-regional, national, European or international); the second section (*Section B – Best Practices Description*) gathers concise information (maximum 15 lines for each sub-section) of context features and problems addressed by the policy action, main activities and services provided, characteristics of the beneficiaries, the partnership, the main results, services and outputs, and innovative factors; in the last section (*Section C – Integration with other projects*) information is provided on projects showing integration with the best practice.

The group of projects surveyed is summarized in Table 4, where the predominant role played by the regional authorities in Italy clearly emerges as contracting and financing body with respect to active ageing policies. Both in terms of numbers and total actual cost of projects, the Italian regional authorities are the main financing institutions, respectively 41.4% and almost 89% of the total⁴, led by Basilicata, Campania, Emilia-Romagna and Veneto, each of them funding two active ageing projects. The European Commission supports another substantial share of projects (37.9%) and total amount of financing (16%), while the remaining programmes involve the provincial authorities (Trento, Bolzano, Pistoia and Genoa) and in one case the Ministry of Labour and Social Security.

The active ageing programmes examined are concentrated primarily in the northern (Emilia-Romagna, Liguria, Piedmont, Trentino Alto Adige, and Veneto) and central (Abruzzo, Marche, Toscana, and Umbria) regions, while a mere 10% are implemented in the southern part of the country (Basilicata, Campania). Of the set of best practices surveyed, a remarkable 28% involves a network of European partners (most of the EC-funded projects) targeting a number of continental countries (mainly Spain, France and Germany).

The average implementation period is close to 2 years, and the 13-24-month category could have been larger if several EC-funded projects had not overrun their typical 2-year term.

The overview of practices and projects carried out at the local level the prevalently multidimensional nature of active ageing projects in Italy and helps identify the tools and strategies coping with the problem of demographic ageing in a comprehensive way.

The Italian approaches to the ageing society are mostly integrated in terms of both the multiple dimensions of the active ageing policy concerned (*vertical project integration*) and wide-ranging cooperation between assorted partners according to individual competencies (*horizontal project integration*). The approaches integrated with other projects (*external integration*) still seem to be underdeveloped, confirming the fragmentation of initiatives and reflecting the lack of strategic planning and implementation with pre-existing and/or corresponding strategies. A handful of the projects surveyed refer generally to the goal of integration with the overall governance system of social policies at the local level such as *Elsa* with respect to “Zone Social Plans” (“*Piani Sociali di Zona*”), *Livorno Senior at Work* within the framework of the provincial development agency (Provincia di Livorno Sviluppo s.r.l.) and *IPERTOOLS* in a comprehensive regional partnership (involving Region, Provinces, unions and Confindustria). The evidence suggests that further close examination of the project partners’ experience of external integration would be opportune.

4 The role of regional authorities in terms of financing amounts is still prevalent even if the project with the largest budget (Regione Basilicata “Programma Sperimentale di Promozione della Cittadinanza Solidale” (PSPCS), ? 34.500.000 of actual total cost, nearly 60% of the total) is not considered.

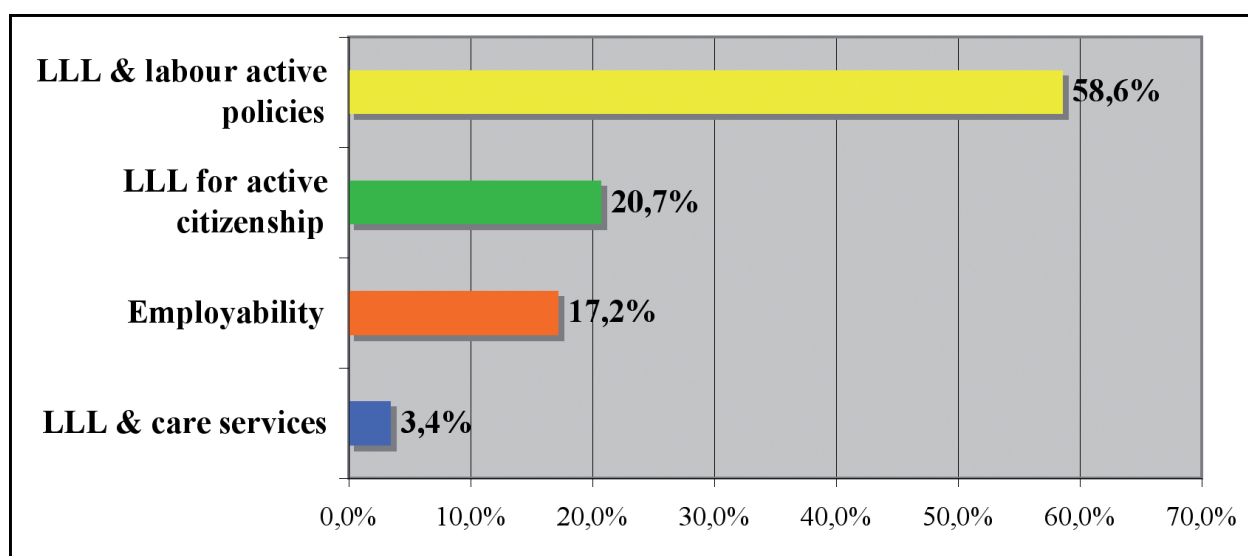
Table 4. Best practices and their financing body

BEST PRACTICE	FINANCING BODY
<i>Placement – Rapporto 2005</i>	Regione Abruzzo
<i>Terza età e welfare nella società dell'informazione</i>	Regione Liguria
<i>Ricomincio da 40</i>	Regione Liguria
<i>Tacitus</i>	EC
<i>Senior Age Management</i>	EC
<i>No out</i>	EC
<i>IPERTOOLS</i>	EC
<i>FRAME</i>	Provincia Bolzano
<i>ELSA</i>	Regione Emilia Romagna
<i>INTRECCI</i>	Provincia Pistoia
<i>SETA</i>	Provincia Pistoia
<i>Circoli di Studio</i>	Provincia Genova
<i>AWARDS</i>	EC
<i>SENIOR</i>	Regione Emilia Romagna
<i>DUCTILIS</i>	Min of Labour
<i>ARTE...TECA</i>	Regione Campania
<i>Programma Sperimentale Cittadinanza Solidale</i>	Regione Basilicata
<i>Investing in People</i>	Regione Marche
<i>ACTING</i>	EC
<i>Determinazione e valutazione performance aziendali</i>	Provincia Trento
<i>ELISIR</i>	Regione Veneto
<i>GEMMA</i>	Regione Umbria
<i>SINERGY</i>	EC
<i>TALENTAGED</i>	EC
<i>F.A.R.O</i>	Regione Veneto
<i>ATTRAZIONI</i>	Regione Basilicata
<i>IN ADVANCE</i>	EC
<i>Senior at Work</i>	EC
<i>ARTES</i>	EC

Practices are analysed taking into account five different dimensions of active ageing policy: employability, lifelong learning, active citizenship, health and quality of life, and transportation/mobility.

One of the remarkable features of the surveyed projects carried out at the national and local level is that most of them affect more than one of the above mentioned dimensions of the overall active ageing policy (see figure 3).

Figure 3. Vertical integration of projects: active ageing dimensions combined (%)



With the notable exception of five projects focusing exclusively on older worker employability (*Placement*, *ELISIR*, *ATTRAZIONI*, *TALENTAGED* and *IN ADVANCE*), the remaining twenty-four identified best practices provided a vertically integrated approach in all cases combining lifelong learning paths with one of the above identified active ageing policy dimensions.

More than half of the active ageing projects examined (17 on 29) aim at mature worker employability through integrated programmes with a major or secondary lifelong learning component and target also other types of beneficiaries such as workers of different age categories, inactive persons or stakeholders, such as unions, industrial organizations, training institutions, employment centres and local authorities (see Table 5).

Table 5. Labour market participation through lifelong learning initiatives: best practice targets and activities

BEST PRACTICE	TARGET	ACTIVITIES
ACTING	Mature workers and enterprises; project partners	<i>Intergenerational transfer of knowledge</i> : research on mature workers distinctive competencies; development of proper tools and experimental pilot sessions with the involvement of senior workers at enterprise level
ARTES	Mature workers, unemployed, inactive, enterprise management	<i>Intergenerational transfer of knowledge</i> : Network of stakeholders and 3 Local Intervention Units; 3 local scientific reports; 6 pilot projects to experiment new training methods and organizational structures for senior workers in the craft and service sectors
AWARDS	<i>Direct</i> : Local authorities, social services providers; <i>indirect</i> : members of local support groups and women older workers	Development of a “Sustainable Life Development” approach; local action plans and pilot initiatives at enterprise level
DUCTILIS	<i>Direct</i> : older workers at risk of exclusion from the labour market due to outdated skills	Survey of enterprises’ approach to temporary and older workers’ skills and competencies; identification of target workers’ and enterprises’ needs in the Region; recommendations for supply and demand matching
F.A.R.O	SMEs	LLL system for SMEs managing generational transition through research and dissemination activities (events, e-learning and multimedia tools)
FRAME	Over-45 (women) and over-50 (men) workers	Advice, placement and training service for the unemployed; skill development plans and intergenerational transfer of knowledge initiatives for the employed
Investing People	Over-45 workers, disabled, entrepreneurs and employment centre staff	Experimenting model of optimization for disabled people and over-45 worker employment through the combination of “competence assessment processes” (<i>bilanci di competenza</i>) and analysis of enterprises’ needs; individual training mainly provided by enterprises; creation of three thematic work teams
Livorno Senior at Work	Over-50 workers; unemployed; people at risk of exclusion	Research and awareness (watch on older workers); training, advice and business support; monitoring and assessment; mainstreaming
IPERTOOLS	Employed, unemployed and over-50 workers (participating enterprises); partner members	Study of older worker unemployment at regional level and collection of international best practices; HR age management models at enterprise level (<i>intergenerational transfer</i>); job clubs; analysis of welfare programmes for mature worker job retention; enterprises networking for innovative practices sharing; training for partner members
NO OUT	Older workers and all the beneficiaries of awareness activities	Permanent watch on older workers’ labour conditions; local action plans for the implementation of new strategies for the valorisation of mature workers; mainstreaming initiatives (policy and regulatory practices)
Performance Aziendali	Employed workers with no explicit targeting of mature workers	Training and coaching at enterprise level
PSPCS	People below poverty line	Hiring contract: financial subsidy to enterprises participating in the entry/training programme
R40	<i>Over-40</i> ; unemployed; registered at Employment Centres	Advice and placement services; training; rebuilding of personal skills portfolio
SAM	Mostly <i>SMEs</i>	Research on age management in European enterprises; qualitative study on SMEs; design of an age management methodology adapted to European SMEs

Table 5. >>

BEST PRACTICE	TARGET	ACTIVITIES
SENIOR	Labour market operators and citizens	Research of over-50 labour market conditions and European trends; recommendations on organizational solutions
SINERGY	Over-40 and women workers	Employment services (networking and comparative analysis); experimentation of integrated interventions for aged workers in 4 enterprises
TACITUS	SMEs (personnel and management); all embodying informal knowledge	<i>Promotion of Intergenerational cooperation:</i> Establishing a permanent network of partners at the European level and a Permanent Centre for the preservation and dissemination of informal knowledge; Guide to intergenerational cooperation and 3 dossiers

Active citizenship through education/training for adults or other formal or informal training activities is the main objective of six programmes often lacking explicit targeting to senior citizenship (see Table 6).

Table 6. Lifelong learning for active citizenship: best practice targets and activities

BEST PRACTICE	TARGET	ACTIVITIES
ARTE...TECA	Senior citizens (twenty-four over 55-year-olds participated in the lifelong learning initiative)	Education for adults and organization of a theatrical performance with younger participants (<i>intergenerational exchange</i> of experience and ideas)
ARTESCircoli di Studio INTRECCI SETA	No explicit senior citizen target	Creation of a network of adult education institutions ("Circoli di Studio"), analysis of training demand, and staff training
GEMMA	No explicit senior citizen target	Analysis of user's population; mapping of formal and informal institutions and sites devoted to training in the area of Perugia; training of trainers; creation of 2 training centres ("Palestre informatiche")
Terza età e welfare nella società dell'informazione	Regione Liguria resident population over 60	Training courses to upgrade over-60 workers' skills in order to tackle digital divide and encourage lifelong learning paths

ELSA is the sole project combining lifelong learning and elderly care services with the aim to transform two unsolved social issues (foreign women's need for social and economic integration and family demand for care services for older members) into an opportunity for social enhancement of the entire community.

The active ageing cases collected in the overview are almost always the outcome of extensive partnership between a public financing body (European Commission, Regional or Provincial authorities), an implementing institution and a network of several project partners cooperating in its implementation according to individual competencies. All the practices surveyed involved the cooperation of several public and private partner institutions (13 partners on average, a maximum of 134 for *Programma Sperimentale di promozione della Cittadinanza Solidale*, a financial subsidy programme to supplement incomes of individuals below the poverty line, involving 131 municipalities of the Basilicata region and the Provincia di Matera and Provincia di

Potenza) with the exception of *Circoli di Studio*, *Placement* and *F.A.R.O.*, respectively implemented by the Provincia di Genova (also financing body of the project) Abruzzolavoro and I.N.I.A.P.A. Veneto without the cooperation of other actors.

The actor typologies vary according to the project objectives and implementation procedures: the main actors in lifelong learning projects for older worker employability are usually secondary schools, universities and other training institutions (formal and informal education) as well as all the major stakeholders in the labour market (unions, industrial associations, chambers of commerce and firms in affected areas and sectors). Each project involves regional or other local authorities (*Province* and *Comuni*) as financing body, promoter or project partner.

The significant cooperative interactions and synergies arising from the extensive partnerships described are among the main features of the Italian scene.

Effective, comprehensive assessment of the contribution of all the practices examined in terms of active ageing needs to incorporate the effect of the above described *horizontal project integration* approach as well as the multidimensional nature of these actions (*vertical integrated approach*) described above.

3. ACTIVE AGEING: TOWARDS A MULTI-DIMENSIONAL INTERVENTION STRATEGY

Faced with the demographic trends observed, the policymakers have the task of identifying the right strategies to offset the negative effects of a phenomenon that is not directly manageable. The 1990s saw debate beginning to focus on policies for “active ageing”— a concept that has taken on various connotations and is thus of a multidimensional nature.

At the international level, as early as 1982 the United Nations had begun to put the issue of population ageing on the agenda, contributing to develop a common strategy in favour of the elderly and active ageing.

In Europe, a keener awareness of the social and economic implications of this demographic trend came about at the end of the 1990s, leading the European Union to draw up a series of recommendations for the Member States to arrive at a common strategy and promote actions in the interests of active ageing.

In 1999 the United Nations announced the International Year of the Elderly stressing the theme of *A society for all ages*. The initiative revises and develops an approach that had already been forged in the past, with reference to the four dimensions of active ageing: lifelong development of the individual, multi-generational relations, and the relationship between population ageing and development; and the situation of the elderly. In short, the issue of ageing is to be approached in a perspective covering the entire lifespan and the broader context of social development. Moreover, the importance has emerged of political investment in the development of the individual throughout the whole of life, and of harmonising the impact of demographic trends with other social developments such as globalization and technological innovation. Finally, the year 2002 saw the Second World Assembly on Ageing held in Madrid, with approval of a second Plan of Action encouraging a participative strategy in access to learning, education and training, and indeed to cultural, economic, political and social life for the elderly as means to overcome social isolation and favour responsabilization.

Within the United Nations system the concept of active ageing found multidimensional expression on the part of the International Labour Organisation, which observed that “active ageing has many dimensions, including the general participation of the elderly population in society and the economy, in family life, employment and self-employment and voluntary work” (ILO, 2000).

The World Health Organisation, for its part, focused attention on health in the third age, defining active ageing as a “process serving to optimise opportunities for health, participation and security, with the aim of enhancing the quality of life during ageing” (WHO, 2002).

In Europe, at the end of the 1990s the European Commission drew up its own contribution for the United Nations *International Year of the Elderly* (1999). The document entitled *Towards a Europe for All Ages* [Com(1999) 221] represents the reference frame for political action at the Community level to address the problem of population ageing. In this document it is argued that the problem ageing raises for European society shows various facets, including:

- ❖ the decline of the working age population and, at the same time, ageing of the workforce due to the increasing number of persons of advanced age who are still active
- ❖ the growing pressure on pension systems and public finances, calling for an approach based on inter-generational equity
- ❖ the growing need for care and assistance for the elderly, and to promote healthy ageing
- ❖ the growing differences between the elderly in terms of resources and needs and the importance of fighting social exclusion.

The Commission document also highlights the gender aspect of age, with the consideration that two thirds of the population over the age of 65 in Europe are women. These figures suggest that mainstreaming approach should be integrated in the general strategy for demographic ageing.

More recently, the European Commission defined a strategy of active practices within the general area of ageing, including “permanent learning, extension of working life, later and more gradual retirement, leading an active life after retirement and engaging in activities serving to stimulate capacities and conserve health” (European Commission, *Increasing Labour Force Participation and Promoting Active Ageing* (COM (2002) 9 final).

The Green Paper “*Confronting demographic change: a new solidarity between the generations*”, adopted by the European Commission in 2005, points out the changes taking place in social and family structures, and in particular the growing number of “workers of advanced age” (55-64 years), of “seniors” (65-79 years) and very aged persons (80+ years).

The Commission therefore proposes that policies should be pursued aiming in particular at creating incentives for workers to continue in their work in advanced age, and to align the pension systems with European employment strategy, singling out four key components: i) increase in the rate of employment of the elderly; ii) reversal of the early-retirement trend; iii) development of research in the medical and social fields to promote healthy ageing and forge new instruments for health; iv) the fight against discrimination and social exclusion.

On the whole, given the increasing worries about the financial sustainability of the welfare systems and public spending, the most widespread approach to active ageing that has been gaining ground entails extension of working life and deferment of retirement age.

Nevertheless, a more comprehensive approach to active ageing that takes into account the various targets concerned and associated objectives has been proposed by the OECD, which observed in the year 2000 that “active ageing refers to the capacity of ageing individuals to lead a productive life in society and in the economy”, incorporating both the work dimension and that of social participation and active citizenship.

At the international level, the best practices in the field of active ageing demonstrate the need to act sufficiently in advance with respect to the age of the population to be involved, and to concentrate attention on implementing integrated intervention models that can take effect along the manifold dimensions of the phenomenon⁵.

5 David P., Perri G., *Le politiche a favore dell'invecchiamento attivo nelle Marche*, Draft Report, October 2009

In fact, longer life expectancy together with new developments in the world of work have led to change in the “tripartite model” of the course of life. Indeed, the very meaning of old age tends to be modified and the opportunities for participation of the elderly in the world of work apply not only to traditional waged jobs, but also to voluntary work and associative life⁶.

Moreover, the interrelation between extension of active life, health, care and active citizenship points the way to a broader connotation of active ageing reaching beyond the two prevalent concepts.

6 Mirabile M.L., *Vita attiva e qualità della vita. I “giovani anziani” e il mercato del lavoro. Andamenti e asimmetrie*, Presentazione SANIT, June 2009

4. THE MODEL FOR EVALUATION OF ACTIVE AGEING POLICIES: AN INTEGRATED APPROACH

The model proposed develops an integrated approach to evaluation of active ageing policies that respond both to the multidimensional nature of the object of evaluation and to the more recent developments in policy evaluation practices.

In particular, reference to an integrated approach in policy evaluation has been developed within the context of the present period of programming of the Structural Funds 2007-2013: in fact, rather more stress has been placed upon integrated development strategies than used to be the practice, thereby favouring a new approach to evaluation. More specifically, the National Strategic Framework for the period in question has introduced an “Evaluation Plan”, i.e. a means to conduct integrated evaluation taking into account all the possible actions that play a part in achieving the various development objectives as they come under consideration (adaptability, equal opportunities, etc.).

The evaluation method designed at the Community level and within the ambit of the Structural Funds appears to be in keeping with the nature of the active ageing policies: in view of the fact that it is a multidimensional issue, the decision-makers have the task of identifying a range of strategies and tools that can contribute to bringing active ageing into effect, and consequently of devising more complex tools of evaluation in order to judge their efficacy in general.

For the purpose of integrated evaluation of active ageing policies, we began by identifying five dimensions that can sum the various objectives inherent to active ageing: employability, permanent learning, active citizenship, health and quality of life, transportation and mobility.

1. the “employability” dimension has to do with the question of the participation of mature-elderly workers in the labour market (reinstatement in work, job retention and exchange of know-how and skills with the younger generations)
2. “permanent learning” has essentially to do with the educational programmes for adults that, on the one hand, target the elderly and, on the other hand, supply formal and informal learning activities transversely
3. the “active citizenship” dimension refers to all those actions dedicated to the development of capacities for senior citizens to take their due part in society
4. the “health and quality of life” dimension comprises long-term health assistance and all the services that can enhance the quality of life for the elderly
5. in relation to the elderly the “transportation and mobility” dimension comprises actions favouring facilitated access to transport

There are two possible evaluation strategies incorporating an integrated approach; they are not alternatives, but complementary:

1. evaluation of integration
2. integrated evaluation.

Evaluating integration means judging whether, and if so to what extent, active ageing policies have been programmed, carried out and evaluated with due integration. In other words, the overall objective is to determine the level of integration of the various policies connected with active ageing put in place at the regional level.

On the other hand, **integrated evaluation** is a method to measure the contribution of various specific policies to the broad objective of active ageing. This means moving on from a sectoral method of evaluation to more complex analysis of a policy mix combined to achieve a single objective.

In the former case, evaluation has to do mainly with the governance of public policies and process analysis (*formative evaluation*); in the latter case, on the other hand, attention focuses on the results and outputs, or in other words on the effective implementation of active ageing policies through a series of programmes and projects (*summative evaluation*).

This approach incorporates two concepts that are central for evaluation: that of “governance” and that of “public policies”. The concept of *governance* refers to the multilevel interaction between the various actors involved in the decision-making process within a particular environment. In general terms, a *public policy* can be defined as “a set of actions implemented by various actors with the aim of solving a problem facing the community, or finding the answer to a need, requirement or opportunity that have not been satisfied” (Azzone e Dente, 1999).

These conceptual references generate three consequences for the evaluation of active ageing policies. To begin with, we must take into account the point that there are a number of factors involved in carrying out interventions; secondly, that there are diverse “needs” or “requirements” to respond to; thirdly, given the complexity of possible combinations of policies implemented at the regional level, the need is to devise tools for evaluation able to deal with a range of problems at the same time.

Evaluating integration means examining whether programming, implementation and integrated evaluation procedures have been applied by the various actors whose task it is to implement active ageing policies in accordance with the five dimensions defined above (horizontal integration). This integration can take on the form of inter-institutional collaboration procedures, and/or programming or integrated strategic planning documents. At the project level, horizontal integration takes on the form of partnership between the various stakeholders involved in implementing the projects.

Performing integrated evaluation means piecing together the picture of policies deployed (which active ageing dimensions have received the most attention, which targets have been reached), evaluating the policy mix which has in practice been implemented.

The questions to be answered in evaluation are:

- ❖ is active ageing “mainstreaming” applied in regional policies?
- ❖ is the principle of active ageing given expression in its various dimensions?
- ❖ have any of them come under fuller focus?
- ❖ and if so, why?

5. APPLICATION OF THE MODEL IN THREE REGIONAL ENVIRONMENTS: SUMMARY OF THE MAIN RESULTS

Application of the model was extended to the three project partner Regions: Liguria, Marche and Campania. Implementation began with the specific contributions produced by the regional partners, integrated with collection of documentation of a regulatory nature and consultation with the stakeholders involved in the various policies.

Below are provided brief summaries of the main results emerging from the individual regional environments, and a transversal reading of the findings assembled is then proposed.

REGIONE LIGURIA

In Liguria, the issue of demographic and workforce ageing looms very large in the light of the main indicators of the demographic context and of the labour market: the structural dependency index comes to 61% and the ratio between the over 65-year-old population and the population of active age amounts 43%.

Over the last few years the Region has addressed the issue of active ageing above all in response to pressure coming from civil society and the actors who deal with ageing issues⁷.

The major programming documents setting out strategies for active ageing deal with three broad areas:

1. education and training
2. social policies
3. health policies.

The policy areas where the drive towards greater integration has made itself most felt are above all those of social policies and health policies. Three regulatory references are particularly relevant here:

- ❖ regional law n. 12 of 2006, the subject of which is “Promotion of an integrated system of social and socio-health services”
- ❖ regional Integrated Social Plan 2007-2010 (PSIR)
- ❖ the very recent bill “Promotion and enhancement of active ageing”, approved on 25 September 2009 by the Regional Council, which organised regional programming in the field of active ageing.

The first law dedicates a specific article to “Policies for the elderly”, developing the lines of intervention for active policies regarding ageing which target people who come to the end of their working life and find that their time has been “freed” to cultivate social relations and maintain a role of active citizenship and participation in their communities. The active ageing dimensions singled out by the law concern: optimising the potential of the elderly in terms of resource, participation of the elderly in the local community, active citizenship, transmission of knowledge/knowhow by the elderly to the new generations, associative structures and health education.

The law bore fruit with the Regional Integrated Social Plan 2007-2010 (PSIR), which makes provision for the institutional actors entrusted with implementation of the Plan – in other words the social territorial ambits, the Provinces and the socio-health Districts – to collaborate among themselves in order to build an integrated system of supply of active policies for ageing. The Plan aims at three broad objectives:

7 Si veda Beccaria E., *Evaluating active ageing policies in Italy: an innovative methodological framework. Draft Report Liguria*, October 2009

- ❖ launch of projects and positive actions to favour advancement, leading roles and active citizenship for the elderly;
- ❖ promotion of forms of intergenerational exchange and learning;
- ❖ promotion of the appropriate lifestyles and behaviours to achieve well-being, fighting the social risk factors.

The interventions that can be implemented aim at:

- ❖ promoting the participation of the elderly in the local community, also through civic activities;
- ❖ launch of local recreational services in which to promote forms of association and social inclusion;
- ❖ interventions, also with the contribution of firms, to favour an active role for the elderly in the transmission of learning to the new generations;
- ❖ production of efficacious information on health and ageing education.

With regard to education and training, regional law n. 18/2009 makes no explicit reference to the issue of active ageing or to specific targets (e.g. over 45-year-olds), except for the part dedicated to ongoing training. Three lines of action are defined:

1. lifelong learning, addressing all “regardless of age” to favour, among other things, the exercise of active citizenship
2. permanent education for adults, enhancing the role played by the third age universities
3. ongoing training, which is seen as a means serving to “contribute to the active ageing of the older workforce component”.

In the recent ESF 2007-2013 programming the over 54-year-olds are indicated as the target to be aimed at, with provision for training activities designed to raise the activity rates and reinstatement in the world of work.

Finally, turning to the law that regulates matters of labour (n. 30/2008), article 14 establishes that the Region and the Provinces “recognise the value of the experience and contribution to the elderly can offer in the various fields of social and economic life, and provide support, in agreement with the social parts and on the basis of analysis of the short- and long-period demographic dynamics, for the implementation of interventions facilitating completion of working life, ensuring social inclusion and equal opportunity”.

REGIONE MARCHE

In the Marche, the regional indicators show that the issue of population ageing is more relevant than ever: the region's demographic structure shows more advanced age than that of Italy as a whole, as of 1 January 2008 the over 45-year-olds accounting for no less than 46.7% of the region's population (the national figure is 44.4%). It is also to be noted that the proportion of the over 45-year-old population is greater among the women, accounting for almost half of the female residents in the Marche.

The issue of active ageing has found only partial expression in the education, training and labour policies: in the last 2/3 years training activity and labour policy addressing the specific category of mature workers have practically found no place in the region. On the other hand, there have been various widespread initiatives throughout the region (online labour exchanges and training projects) addressing the broader category of the disadvantaged including, on the basis of the regional indications (D.G.R. 491/2008), part of the members of the target we are dealing with here, i.e. unemployed over 50-year-olds. However, the ESF 2000-2006 monitoring data revealed that the over 45-year-olds benefiting from interventions financed with the ROP came to just under 14% of the total of beneficiaries who had concluded their activities.

In the new ROP 2007-2013 there do not appear to be any precise indications regarding actions specifically addressing the over 45-year-olds, who are taken in above all as transversal target of a series of actions addressing the broader category of the employed (ongoing and permanent training) and/or that of the disadvantaged (work-experience, hiring incentives, incentives for entrepreneurship).

In social and socio-health policies, the approach to active ageing finds expression in the first place as "policy for the elderly", and in particular over 65-year-olds. The Region has for some years been working on a series of initiatives addressing the elderly, with particular efforts in the direction of a strategy more of social promotion than of social protection. The 2002 programme the Elderly as a Resource aimed at providing support for the active citizenship of the elderly population, placing at the disposal of the Territorial Ambits ?360 million for positive and innovative Action Plans in favour of the elderly as "resource". The programme saw the involvement of the local bodies, union organisations, associations, foundations and voluntary organisations. The overall aim is to enhance the scope for active citizenship for the elderly, promoting social learning within an intergenerational perspective, and providing support for self-organised initiatives to complement the interventions and services supplied by the system for social and territorial quality.

In line and in continuity with the programme, in 2004 the Region approved the "Elderly Plan" drawn up by an extended technical team consisting of representatives of organisations of relevance to policies in support of the elderly. The Plan adopts the approach that old age is to be lived as an age to discover and invent, opening up scope for creativity, ongoing training, committed efforts for the self and others, and prevention of the risk of non-self-sufficiency. The overall objective is to innovate the Region's welfare system in the direction of enhancing the quality of life for the elderly and accompanying people on the path of natural ageing.

Essentially, the Plan carries on from the actions put in place in 2002: initiatives at the level of aggregation (enhancement of the social centres for the elderly), assistance (tele-assistance services), activities (time banks, activities in the schools, good neighbourliness), prevention (support in the transition from work to retirement), information (creation of information centres for the elderly) and culture (third age universities).

With reference to the social policies, the Regional Plan for the integrated system of social services and interventions of 2001 (in implementation of law n. 328/2000) provides for a series of initiatives with particular focus on the problem of non-self-sufficiency, and thus on enhancing and equipping the facilities and services, with appropriate qualification of the staff working in this field. The target is the elderly population, and the approach is one of social protection concentrating on assistance in the home, residences and rest homes. On the other hand, the supply of socio-cultural activities, activities for reinstatement in the world of work, holidays and social centres remains relatively marginal.

REGIONE CAMPANIA

Campania turns out to be the youngest Region in Italy: the share of the population belonging to the 0 to 14 year age range is the largest, the percentage of over 65-year-olds and the average age of the residents (39.1 as against 42.8 years in Italy) the lowest. This age range structure is consequently reflected in the principal demographic indexes: both the older dependency index and the structural dependency index are lower than the national average and those of the other national districts (the EDI in Campania comes to 23% as against the 30% of the national average; the SDI to 48.5% as against 51.7%) and the old age index is lower than 93%, thereby signalling Campania as by now the last region in Italy with a proportion of over 65-year-olds smaller than that of the under 14-year-olds.

Given this situation it is hardly very surprising that the active ageing strategies in place at the regional level show relatively scant development. From the point of view of the employability of mature workers, there are no labour market policies specifically addressing the over 45-year-olds, but only measures that can indirectly affect the target of active ageing policies.

In terms of education and training, the only interventions aiming at a target of mature workers have been those promoted within the field of Adult Education, a sector in which the Campania Region has gained an outstanding avant-garde position, having been the first to establish a Regional Committee for Adult Education in 2001⁸.

Particularly significant here are two calls for tenders:

- ❖ a call regarding over-55 adult education ROP 2000-2006
- ❖ an over-45 Study Circle call ROP 2007-2013

The first call set as the target women and men, employed and unemployed, resident in Campania and aged over 55, whether pensioners or not. The call specified that the fundable training projects were to follow an *integrated approach* in terms of actions (integrated project) and actors (actor integration): the implication of the project level integration is that various intervention typologies be included within the project. This integration must be consistent with and functional to the nature of the project. Integration at the level of the actors implies the formal constitution of a partnership to propose and implement the project together. By “formal constitution of a partnership” is meant the formal association of various different actors advancing the proposal (A.T.I., A.T.S.).” The contents of the courses included study cultural activity techniques with the focus on developing creativity; inclusion of adults in their social contexts; dissemination and consolidation of scientific, linguistic and literary culture, also with the use of multimedia tools; promotion of roles serving for mediation between different cultures, and, finally, maintenance of psychophysical well-being.

8 Cfr. Mazzotta F., *Le politiche per l'invecchiamento attivo in Italia*, November 2009

With the second call, financed with the new ESF ROP 2007-2013, the Regione Campania set out to verify the interest of Communes, Vocational Training Organisations, Permanent Territorial Centres, People's Universities and Third Age Universities, as well as various other agencies working in the area, in carrying out, within the sphere of Adult Education, 37 *Study Circle* Projects for the adult population. Each Study Circle is to consist of small groups of people (10-12 persons over 45) coming together on the basis of common interest in a topic: it should on average expect to hold about 10 meetings of more or less three hours' duration, stimulating exchange of ideas and debate on the topic of interest for the participants in the circle.

In terms of social policies, the Regional Social Plan 2009-2011 sets itself the objective of consolidating a differentiated supply of services/interventions in support of the elderly and their families, beginning with a basic infrastructurisation of home assistance services, Multifunctional Social Centres and residential facilities in order to guarantee the essential levels of assistance. In addition, albeit in a relatively marginal role, social inclusion interventions are to be promoted reaching beyond the essential levels, but serving to optimise the experience and contribution of the elderly in creating social solidarity networks, recognising their right to active citizenship, and also with the involvement of protection associations and voluntary workers.

With regard to the overall ends of the Plan, a recent report issued by the Regional Council points out that only 14% of the resources allocated have gone into active ageing policies, as policies applying the self-sufficient elderly, while the bulk of the resources have been channelled into assistance for non-self-sufficient elderly people.

6. SOME GENERAL POINTS AND IMPLICATIONS FOR PROGRAMMING

The findings emerging from the regional case studies revealed that, contrary to what one might reasonably have expected, the policies and practices for active ageing implemented at the regional level respond only to a limited extent to the demographic structure and labour market participation as pictured by the principal indicators. Secondly, there does not seem to be any common interpretation of the precise meaning of the term “active ageing”, taken to refer alternatively to mature workers or the elderly.

Attempting a transversal evaluation of the active ageing policies in the three regional situations, the following three aspects are worth pointing out:

1. the meaning of active ageing taken in different ways in education and training policies, and social and health policies, respectively:
 - prolonging working life
 - active participation in the life of society
 - support for the non-self-sufficient

2. the consequent sharp distinction between targets:
 - on the one hand, “active” elderly people or mature workers
 - on the other hand, inactive elderly people, i.e. pensioners
 - finally, weak/fragile, non-self-sufficient elderly people

3. the consequent sharp distinction between policies:
 - labour and training policies (focusing on the over 45, over 50 and over 55)
 - social policies (national fund for social policies, positive and innovative interventions for the elderly)
 - health or social protection policies (above all in cases of non-self-sufficiency)

The direct consequence of these three points is the almost total lack of integration between the various policies, and above all between the first and the other two. The closer integration between social policies and health policies is due to the effects of law 328/2000, which provides for the creation of ambits/districts and strategic or integrated programming tools (social plans, area plans, territorial ambit plans). On the whole, however, we note a fragmentation of initiatives in the social and health areas, in only a few cases able to benefit from “bottom up” integration, between actors of civil society and the third sector concerned with active ageing in socio-health terms or in terms of education/training supply for the elderly (third age university).

There is a lack of clarity about the ultimate objectives of lifelong learning and/or adult education, although this could be an area subject to close integration in that it cuts across the various targets. In some cases the permanent education initiatives are designed to address mature workers, while in other cases they are seen as means for active citizenship and social inclusion for “adults”, no better defined.

The policies for social inclusion cut activities across the various categories; there is no strong focus on the target of mature workers and the elderly, generic interventions being designed to address the broad category of the “disadvantaged”.

From the perspective of integrated evaluation, then, what as a whole is the implementation strategy employed, and what the policy mix? Although population ageing raises a series of problems at the social level and in terms of health, welfare and the labour market, the combination of actions embarked upon appears decidedly and all too simply biased towards the “elderly” *tout court*. In particular, we see:

- ❖ scant attention for the over-45 target and in general for mature workers
- ❖ a prevalence of interventions for non-self-sufficient or “fragile” elderly people (home assistance, reception and information, transportation)
- ❖ scant and indeed fragmentary development of initiatives for active citizenship and social inclusion
- ❖ limited spread of Adult Education and lack of clarity about the target objectives
- ❖ scant innovation in the supply of initiatives for the elderly, aiming prevalently at organising trips/holidays, cultural and recreational activities, and socially useful activities.

To summarise, the active ageing policies tend to show the following weak points:

- ❖ lack of an overall implementation strategy to accompany people along the path from the “mature” stage of working life to the stage of “non-productive” life
- ❖ scant attention dedicated to the difficulties of mature workers, with regard both to the needs for re-qualification and to age management issues in firms
- ❖ failure to recognise the competences and the importance of the activation process for the elderly, also at the intergenerational level
- ❖ an essentially basic welfare approach to the needs of the elderly, often with excessive bias towards “care” aspects
- ❖ the inefficacy of the traditional approaches to involving the elderly in public and social activities.

In particular, in the area of education/training addressing the elderly population we observe:

- supply of education/training depending largely on private agencies and facilities
- a relative prevalence of education/training activities serving for recreational purposes and personal development
- continued failure to recognise the importance of tele-education and use of information technology tools for communication as effective means of education/training.

The policy indications that can be derived apply both to the ways and means of programming and to the specific contents of actions.

A) IN PROGRAMMING PROCEDURES (PROCESS), THE NEED IS TO:

- move on from a sectoral approach to active ageing, working in the direction of an integrated approach
- apply programming and project tools incorporating an integrated approach, exploiting the connections between the sectoral policies targeting the same categories, taking into account the reciprocal effects of these policies (PAR Emilia Romagna, 2004)
- coordinate active labour policies, and educational and training policies with social policies aiming at inclusion and promotion of greater social cohesion
- define an active ageing strategy, which means tracing out the path along which to accompany the individual through the various stages of life

B) IN THE PROGRAMMING CONTENTS (PRODUCT), TO:

- develop a lifelong learning approach with closer focus on adults and the elderly
- develop learning for adults approaching exit from the age traditionally considered productive
- develop innovative lines of intervention, in particular in the area of actions aiming at active citizenship
- develop a more genuine interpretation of active ageing, superseding the approach in terms of expressly dedicated spaces and activities (e.g. centres for the elderly)

In particular, lifelong learning is central to the general active ageing project, which should address certain specific aspects of active ageing such as overcoming the digital divide, the intergenerational barriers and barriers between ethnic, religious or cultural groups.

MAIN BIBLIOGRAPHICAL REFERENCES

- Activage (2004), "Active Ageing in Europe: Methods, Policies, and Institutions – Deliverable D1: WP1 - Country Report Italy", (<http://www.iccr-international.org/activage/docs/activage-wp1-it.pdf>).
- Benini R.(2007), *La pianificazione integrata per la promozione sociale e l'invecchiamento attivo*, mimeo.
- Cagiano de Azevedo R. (2004), *The European Welfare in a Counter Ageing Society*, Kappa Ed.:Rome.
- CNEL (2006), *Rapporto sul mercato del lavoro*, Rome.
- D'Emilione M., and M. Parente (2007), *Analisi dei sistemi di monitoraggio dei Servizi per l'impiego a livello regionale e locale*, Isfol, Monografie sul mercato del lavoro e le politiche per l'impiego n.3.
- Eurostat (2008), "Ageing characterises the demographic perspectives of the European societies", Eurostat Statistics in Focus, 72/2008.
- Fondazione Giacomo Brodolini (2007), "Occupazione e Occupabilità degli Over 45: Il ruolo dei COL nel Comune di Roma", mimeo.
- Interministerial Committee for EU Affairs (2008), *National Reform Programme 2008-2010, Lisbon Strategy for Growth and Jobs*. Available at: http://ec.europa.eu/growthandjobs/pdf/member-states-2008-2010-eports/PNR_IT_202008.pdf
- ISFOL (2008), "Le Politiche aziendali per l'age management: materiali per un piano nazionale per l'invecchiamento attivo", Monografie sul mercato del lavoro e le politiche per l'impiego.
- ISFOL - Provincia autonoma di Trento (2007), *Invecchiamento attivo: lavoro, lifelong learning, welfare*, Torino 20-21 settembre 2007, Conference book.
- Leone L. (2007), *Programmazione e pianificazione strategica e nuove politiche di welfare*, Relazione conclusiva IX Convegno nazionale "Welfare della coesione e dello sviluppo: politiche integrate, partecipazione, saperi e strumenti gestionali", Rimini ottobre 2007
- Ministero del Lavoro e delle Politiche Sociali/ISFOL (2006), "Rapporto 2005 sulla formazione continua", Rubbettino: Soveria Mannelli.
- Mirabile M. L. (eds.) (2009), *Vita attiva? I "giovani anziani" tra insicurezza e partecipazione*, Ediesse: Rome.
- Mirabile M.L., Nardini L., De Laurentiis A. (2006), *Essere over: età, mercato del lavoro e nuovi scenari di welfare*, Quaderni SPINN
- Nielsen F.(2005), *L'invecchiamento attivo: una politica centrale e prioritaria per l'Unione europea*, Quaderni europei sul nuovo welfare n. 2
- OECD (2009), *Pensions at a Glance: Retirement-Income Systems in OECD Countries*, (www.oecd.org/els/social/pensions/PAG).
- Regione Emilia Romagna, *Piano di Azione per la comunità regionale. Una società per tutte le età: invecchiamento della popolazione e prospettive di sviluppo*, Council Deliberation n. 2299 of 22 November 2004
- Saltini L., *Il sapere necessario La partecipazione degli anziani all'istruzione ed alla formazione, tra nuovi bisogni e cittadinanza attiva*, Collana Studi e ricerche, ed. LibErtà, 2007



With support from the European Commission
Employment, Social Affairs and Equal Opportunities DG
Duration 12 months – Reference No.VP/2008/006/14

activeage