



‘The European social dialogue and the development of the solidarity between generations of workers: focus on “over 55” and young workers in the finance sector. Sustainable Growth and generation gap’ - VS/2018/0040

Project Presentation

Valencia, 17-18 May 2018

Sara Barberotti

Project Manager – FIRST CISL



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Premise

Progressive aging of the European population

The demographic changes of the last decades in Europe have shown a progressive increase in average life and the related aging of the population. These phenomena have been added to the decrease in the birth rate, aggravating the anomalies in the age pyramid.

It is estimated that in 2060, 29.5% of the total population will belong to the "over 65" (in 2013 this percentage was 18.2, according to EUROSTAT).

The repercussions on pension systems have been negative from a financial point of view and will be greater in the future, leading to an imbalance in the social security accounts of the various states of the Union and more generally on social protection systems.

The answer has been a consequent increase in the retirement age that has produced significant alterations in the age structure of the working population in the various companies, both on a general level and in the various productive sectors.



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In the financial sector, redundancies, expulsion of labour and loss of professionalism

In the financial sector, almost in the same period, a strong process of mergers and mergers began with the strengthening of the capital of the system, which however produced a considerable amount of redundancies in terms of human resources in the sector as a negative side effect.

In these phases of company reorganization, processes for the expulsion of labor were activated, which penalized above all the older workers, very often belonging to the category of managers and workers with greater professionalism.

The result was a net loss of knowledge and professionalism on the part of companies, that intangible, unique asset, able to guarantee continuity of success over time and permanence of corporate identity values, through the transmission of experiences from a working generation to the other.

In fact, older workers represent a wealth of knowledge and experience to be exploited and passed on to younger generations, certainly not a "burden" to be downloaded.



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Follow up of the 2012 project: Intergenerational solidarity

Starting from these considerations the FIBA CISL (today FIRST CISL), with the collaboration of 9 partners belonging to 6 European countries, in 2011 developed an action to better understand the phenomenon and promote initiatives in the field of intergenerational solidarity.

The action was funded by the EC and was inserted in the context of the European Year of Active Aging, seeking and finding operational synergies with other initiatives at European level. The objectives and results of the project were appreciated so much to be included in the collection prepared by the EC on the initiatives related to the European year available at:

<http://europa.eu/ey2012/ey2012main.jsp?catId=975&langId=en&mode=initDetail&initativId=587&initLangId=en>



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Actual situation

Aging, digitalization, knowledge obsolescence

After six years, the demographic and socio-economic background of reference has not changed: the aging of the European population has grown, the retirement age has increased in step with the extension of life expectancy and older workers are increasingly considered a problem rather than an opportunity for companies in general and in particular for the professional growth of younger workers.

In addition to these phenomena, the process of digitization of activities has accelerated in the financial sector, with a strong increase in new technologies in production processes that tends to create a sort of new "illiteracy of return" in the older classes of workers, accentuating obsolescence of old acquaintances.



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Objective of the Project

The main objective of the project is to demonstrate that the most effective response to the challenges of demographic change is the identification of a "virtuous circle" of synergy between European, national, corporate and EWC unions in order to negotiate a flexicurity contractual system for aged workers with companies that integrates social security and welfare systems, to anticipate and manage work changes in a solid and inclusive manner.

Objective and expected results



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Strengthening the role of effective industrial relations

Promote synergies between national, company and EWC unions

Good practice analysis and empirical research

Training on the subject

Context analysis and scientific research

Demonstrate that the most effective response to demographic challenges is to promote a customary flexicurity system for "aged" workers.

Dissemination results



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Research and analysis

The project is characterized by a strong component dedicated to research and analysis. In our case, research activities are divided into two main categories: scientific research and empirical research aimed at identifying good practices regarding age management

The innovative action and effectiveness of our approach is to merge the experience and empirical knowledge of the trade unions operating in the financial sector and the ability to analyze and study university research institutes to develop Industrial Relations within the EU, in terms of increasing knowledge and skills and disseminating them among the actors of the European social dialogue.

What we are going to do

Context analysis of reference

- variables (demographic, economic, social, jurisprudential, etc.);
- probable medium-long term developments;
- drawing of scenarios and comparative analyzes between the various European countries

Universities
and Research
Centers

Trade Unions
and
Companies

Identification of "Good practices"
on Age Management



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Two Universities involved

POLIBIENESTAR Research Institute - University of Valencia, an important Spanish research institute for social policy.

ŁODZ UNIVERSITY - Faculty of Economics and Sociology

A Research Center

ADAPT - a non-profit organization that promotes studies and research in the field of labour law and industrial relations from an international and comparative perspective.



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Scientific contributions :

POLIBIENESTAR

Univiversity of Valencia

It will have the task of describing:

the demographic context and medium-long term trends at the European level by analyzing trends in banking and financial employment in relation to demographic changes and digitization that are changing the organization of production factors in the sector;

the socio-economic dynamics and the consequent employment trends that have gone through the financial sector in the last ten years, with particular attention to the dynamics of young people (aged 18 to 32) and older workers (≥ 55).



th EU
ntribution



Scientific contributions:

University of ŁODZ (ULO)

It will analyze the role and position of the social partners in the search for solutions in the management of older workers in order to guarantee a sustainable working life, both in terms of quality of work and ability to work; on measures able to guarantee the correct transmission of the experience and skills of older workers to younger colleagues, with particular reference to the financial sector.



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contribution



Scientific contributions::

ADAPT

It will analyse:

- the effects of the intergenerational solidarity instruments implemented in the various European countries as an instrument of intergenerational balance;
- the effects of the "digital revolution in banks" and the relative development of new skills and new professional roles in the face of the challenges of the generation gap between workers.



Partnership

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With us in the project we have a strong and significant transnational partnership:

9 European countries (beyond Italy):

Belgium, Finland, France, Greece, Hungary, Malta Romania,
Spain and Turkey (candidate country).

Moreover:

- APF First - Associazione Alte Professionalità
- UNI Europa
- Intesa SanPaolo Group
- FEDERMANAGEMENT, Associazione nazionale di dirigenti d'azienda.

Partnership

APPLICANT

- **FIRST CISL - Italy**



COAPPLICANT

- **POLIBIENESTAR -Valencia**
- **ŁODZ UNIVERSITY – Poland**
- **ADAPT - Italy**



**8
TRADE
UNIONS**

- **OTOE – Greece**
- **PRO - Finland**
- **BBDSZ – Hungary**
- **FEC-FO - France**
- **MUBE – Malta**
- **UPA – Romania**
- **UGT – Spain**
- **BASISEN – Turkey**

**FEDER
MANAGEMENT**

INTESA  SANPAOLO



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Contribution



The project lasts 2 years and puts in place 4 categories of activities

1. - **STRATEGY AND TACTICS** - Strategic and tactical content activities, as well as monitoring activities, under the responsibility of the Project manager and Steering Committee
2. - **STUDY RESEARCH AND ANALYSIS** - Remote working of the Working Groups, Verification Good practices, meeting for comparison and sharing
3. - **EVALUATION AND FOLLOW UP** - Will start after each activity so that the project can proceed along the planned path, promptly introducing any necessary corrections
4. - **DISSEMINATION OF RESULTS** - Includes a Workshop, a Training Course and a European Conference.

The project structure

THE OPINION POLL



The project consists of 9 phases

done!

1. PREPARATORY WORKS

It is the formal start of the project, the Steering Committee is preparing to launch the project. In this phase we proceed to the selection of documents to be shared with the partners, and to the construction of the web application called Virtual Agora, a purpose-built web tool, a "virtual square" where all the participants can meet to gather and find materials, contributing to the discussion by interacting, making a contribution by adding value to the discussion.

The breakdown and functioning of the Virtual Agora will be illustrated by **Mr. Luciano Malvolti** in his report.

Today and
Tomorrow



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Contribution



2 . KICK OFF of the Project

It is the first meeting of the partners and represents the most delicate moment of the whole project. The meeting will bring together all the members of the Steering Committee, the facilitators of the working groups and the experts.

We will try to build a common base of minimum knowledge on the issues related to the management of the aging of workers and its consequences in the world of work, with the report of the scientific director

The three scientific institutes will present themselves illustrating their contribution to scientific research.

It is a training and operational meeting at the same time that will take place according to the agenda that has been sent to you and which we will see shortly.

KICK OFF
Valencia

May
17-18

RESEARCH
&
DISTANCE
WORK

Virtual
agorà

Jun 2018-
Jan 2019

WG 1

WG 2

3 . PHASE - RESEARCH AND ANALYSIS - Distance work

This phase includes:

the research activities carried out by the three scientific institutes

the distance work carried out by the trade union working groups through **Virtual Agora** collection and the identification of "good practices" in the management of the aging process of workers and in intergenerational solidarity in the financial and banking sectors

Jun 2018-Jan 2019

June 2018-
Jan 2019



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www.adapt.it



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Two Working Groups



WG1

Representatives of the trade unions that participated in the old project

[BBDSZ (Hungary), UGT FESMC (Spain), MUBE (Malta), UPA (Romania) and FIRST - then FIBA]

Will have to verify the actions / activities implemented in the 2013-2018 five-year period

on the push of the solicitations / stimuli that the previous project had produced (follow-up activities).



WG2

The other unions

FEC FO (France), BASISEN (Turkey), PRO (Finland), OTOE (Greece).

He will have to investigate agreements, good practices, etc. regarding the age management policies implemented in the participating countries



4. Steering Committee Meeting

At the end of the work at a distance there will be a meeting of the Management Committee for the sharing of research results and for the construction of a unitary synthesis document.

A web-based survey will also be launched on the topics covered by the project.



Spring 2019

WORK
SHOP
EUROFOUND
2019

5. Workshop held at EUROFOUND

Objective: to present the "Policy recommendations" related to the first reading of the research results. The comparative analysis between the results of our research and the results of the three surveys conducted by EUROFOUND will be very significant:

the survey on the European company ECS,

the survey on the quality of life in Europe EQLS

the survey on working conditions in Europe EWCS.

Summer 2019

6. Steering Committee Meeting

Objectives:

analysis of the results of the workshop and intermediate evaluation of the project results

set up design and identify training course content.

STEERING
COMMITTEE
MEETING
2019

Autumn 2019

TRAINING
COURSE

2019

7. Training Course

Objectives:

Provide participants with knowledge, skills and methodological tools for the negotiation of collective agreements that include policies of intergenerational solidarity and management of the aging of workers.

Participants: expert contractors from the main banks and insurance companies of the 10 partner countries of the project.



8. Steering Committee Meeting

Objectives:

Analysis and validation of the results of the training course

Prepare program and materials for the European Final Conference.

STEERING
COMMITTEE
MEETING

2019



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FINAL
CONFERENCE
Primi mesi
2020

9. Final Conference

The Conference will be open to all actors of social dialogue.

Objectives:

- Present the results of the project and possible developments;
- Launch the site "Solidarity between the generations in the financial sector: policies, recommendations and best practices";
- Identify the tools for disseminating the results to foster broad participation and discussion among the actors of the social dialogue.



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Kick off:

What we do today and tomorrow

Agenda

Day 1

13:00 – 14:00 Registration and preliminary information

14:00 – 14:15 Opening, welcome

- by UGT FESMC SERVICIOS – Spanish Trade Union

14:15 – 15:00 The Project: applicants, partners, objectives, expected results, methodology, administrative rules

Sara Barberotti FIRST CISL – Project Manager

15:00 – 15:30 The Age Management: an inescapable challenge for the labour world and society

Domenico Iodice, Scientific Director of the Project - FIRST CISL

15:30 – 16:15 The contribution of project's Co-Applicants: ADAPT

Elena Prodi – Adapt

16:15 – 16:30 Coffee break

16:30 – 17:15 The contribution of project's Co-Applicants: UVEG-POLIBIENESTAR

Sandra Martinez – Uveg-Polibienestar

17:15 – 18:00 The contribution of project's Co-Applicants: University of LODZ (ULO)

Izabela Warwas – University of Łódź

18:00 – 18:30 Q&A

18:30 – 18:45 Closing and synthesis of the work of the first day

Sara Barberotti – FIRST CISL

Day 2

09:00 – 09:30 Presentation of Trade Union Partners

Luciano Malvolti FIRST CISL

09:30 – 10:45 The Age Management: the state of art in the partner countries. In particular, what are the multiplicative effects arising from the 2012 project?

Panel – Moderator: *Domenico Iodice*

10:45 – 11:00 Coffee break

11:00 – 11:30 Presentation of the Virtual Agora: purposes, functions, use

Luciano Malvolti FIRST CISL

11:30 – 12:00 Q&A

12:00 – 12:30 The Activities of the social partners on the Virtual Agora: Presentation of the two Working Groups

Paola Vinciguerra FIRST CISL

12:30 – 13:00 Qualitative surveys: proposals to maximize operational synergies

Domenico Iodice, Scientific Director of the Project - FIRST CISL

13:00 -13:15 Conclusions and next project development

Sara Barberotti, Project Manager - FIRST CISL



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ADMINISTRATIVE PROCEDURES



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1. ADMINISTRATIVE RULES:

All original receipts for travel and subsistence costs attributable to the project must be sent to :

FIRST-CISL

European Projects - VS/2018/0040

Via Modena 5

00184 Rome

ITALY



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2. ADMINISTRATIVE RULES:

The cost of airfare must not exceed the amount indicated in the project budget (**300.00 euros**) and to be accepted by the European Commission must be in economy class. When applying for a refund, you must attach the **boarding passes** in addition to the **airline ticket**.



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3. ADMINISTRATIVE RULES :

You must attach to the original copies a brief description of the individual costs incurred (in English or Italian) in the case of a different currency attach the conversion into euros.



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4. ADMINISTRATIVE RULES :

Tax refunds are accepted only when there is no other means of transport or when it is essential (for example: you arrive at the airport during the night). In any case, the rule is: use public transport.

To obtain reimbursement of expenses you must use our format, which you will find attached.

NOTE: However, the use of the taxi must be justified!

5. ADMINISTRATIVE RULES :

As a rule, the car trip does not provide for a refund.

Exceptionally, in the case of travel by car, you can request a refund of the amount, on that route, of the **train journey in first class**, using our refund format. Therefore, the expenses associated with the use of a car (motorway tolls, car parks, etc.) are not reimbursed anyway.



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Thanks!