



**European Cooperation  
in the field of Scientific  
and Technical Research  
- COST -**

---

**Brussels, 14 November 2014**

**COST 109/14**

**MEMORANDUM OF UNDERSTANDING**

---

Subject : Memorandum of Understanding for the implementation of a European Concerted Research Action designated as COST Action IS1409: Gender and health impacts of policies extending working life in western countries

---

Delegations will find attached the Memorandum of Understanding for COST Action IS1409 as approved by the COST Committee of Senior Officials (CSO) at its 191th meeting on 12-13 November 2014.

---

## MEMORANDUM OF UNDERSTANDING

For the implementation of a European Concerted Research Action designated as

**COST Action IS1409**

### **GENDER AND HEALTH IMPACTS OF POLICIES EXTENDING WORKING LIFE IN WESTERN COUNTRIES**

The Parties to this Memorandum of Understanding, declaring their common intention to participate in the concerted Action referred to above and described in the technical Annex to the Memorandum, have reached the following understanding:

1. The Action will be carried out in accordance with the provisions of document COST 4114/13 “COST Action Management” and document 4112/13 “Rules for Participation in and Implementation of COST Activities”, or in any new document amending or replacing them, the contents of which the Parties are fully aware of.
2. The main objective of the Action is to enhance scientific knowledge of the gender and health impacts extended working life policies, by integrating disciplines, developing collaborations, creating scientific, policy and public interest and developing a new generation of researchers in this field.
3. The economic dimension of the activities carried out under the Action has been estimated, on the basis of information available during the planning of the Action, at EUR 52 million in 2014 prices.
4. The Memorandum of Understanding will take effect on being accepted by at least five Parties.
5. The Memorandum of Understanding will remain in force for a period of 4 years, calculated from the date of the first meeting of the Management Committee, unless the duration of the Action is modified according to the provisions of Section 2. *Changes to a COST Action* in the document COST 4114/13.

## **A. ABSTRACT AND KEYWORDS**

The goal of this Action is to advance scientific knowledge about the gendered impacts of extended working life on the health and economic well-being of older workers in Europe and to support informed gender-sensitive future policy, explicitly considering the differential needs of women and men. This requires exploring the differential impacts that such policy may have for the health and economic well-being of diverse groups of older workers, using a life course perspective which has been identified as an innovative approach to analysing policy impacts. While life course analysis of pensions has been employed in some COST countries, there is a need to build a research network to develop capacity in life course methods and in gender-aware policy analysis to enable accurate, timely, multi-disciplinary, cross-national analysis of employment policy and practice for older workers. Expected deliverables include: (a) creating a website; (b) depositary database of scientific measures and policy tool-kits; (c) facilitating training schools, Short Term Scientific Missions and conferences; (d) disseminating scientific reports, proceedings, academic publications, policy papers and an edited book on extended working life, health and gender. This Action is both timely and policy-relevant, due to the pressing European phenomenon of demographic ageing, the piecemeal state of current research, and to develop appropriate and equitable policy in COST countries.

**Keywords:** Extended working life policies; gender analysis; health and economic well-being impacts; life course approach.

## **B. BACKGROUND**

### **B.1 General background**

Demographic ageing is recognised by the European Union, other international policy bodies and by governments as posing key challenges and opportunities (Organisation for Economic Cooperation and Development, 2012, European Commission, 2012). The proportion of the European population aged 65 and over is 17% and is expected to increase to 30% by 2060, the majority of whom will be women (Eurostat, 2011). Healthy life expectancy has increased, and an important policy goal of the EU is to encourage Active Ageing and to realize the potential for older people to participate fully in economic, social and cultural life (European Commission, 2012). However, between the gains in healthy life expectancy and the potential to participate fully in all aspects of life is the gulf between later life employment, health, and pension adequacy, and women's and men's differences in these

later life domains. Many European governments have responded to demographic ageing by introducing policies designed to extend working life including increasing state pension age, raising retirement age (Sweden, Portugal, the UK and Ireland) and reducing the generosity of pension benefits (Van Meerton, 2009). These policies have been introduced rather quickly, often without fully considering the impacts that such policies may have for the health and economic well-being of diverse groups of older workers, including men and women in precarious and secure occupations, or across different types of welfare state regimes.

The main goals of this Action are: (1) to develop new understandings and best practice for research into extended working life and gender and to create a platform which harmonises a number of methodologies, disciplines and approaches; (2) to enhance and add value to current research in these fields and build capacity for future collaborative research; (3) to provide training, support and mentoring for emerging researchers in the field of gender and extended working life; (4) to act as an innovative platform for knowledge exchange and dissemination of good practice among researchers, practitioners, policy-makers, NGOs and other relevant stakeholders including trade unions and employers.

## **B.2 Current state of knowledge**

In European discourse on ageing and social policy, a compelling case for extending the working lives of older people is gaining ground. Firstly, it is argued that the ageing of the population in combination with low birth rates increases pressure on the economic resources of governments, especially as the dependency ratio rises in most countries (Eurostat, 2012). In addition, the increase in life expectancy after retirement (projected to be 26 years for women and 22 for men in 2060) poses challenges for individuals to maintain income security and avoid poverty for much longer than was envisioned as pension systems were developed. Secondly, global economic instability has strained state revenues and individual income streams. The consequences include austerity measures and unstable and inadequate income for individuals, necessitating broader employment participation across different age cohorts in order to recover from the current economic recession. Thirdly, there is growing concern in many countries that state revenues will be insufficient to meet future pension obligations – with projected expenditure in Europe rising to 12.9 % of GDP in 2060 (European Union, 2012)—without crowding out other essential social policy obligations. Fourthly, a body of literature on the effects of active ageing among retirees found that social and economic engagement is associated with increased quality of life and decreased loneliness (Morrow-Howell, 2010). To the extent that this holds true, for some older workers

remaining in employment can be interpreted as a positive life event rather than a burden. Policies to extend working life vary by country and include raising the state retirement age, eliminating mandatory retirement, restricting early retirement, incentivizing labour force participation of older men and women (65+), restructuring incentives for contributions to pensions schemes and pension benefits, and encouraging flexible employment options.

Adopting an active ageing framework, European institutions have prioritized attention to policy initiatives to support and encourage working longer. EU legislation with a particular focus on anti-discrimination has played a key role in supporting active ageing. For example the EU adopted *Council Directive 2000/78/EC* that directs Member States to make illegal unequal treatment in employment, recruitment, and training. The *Europe Strategy 2020* suggests that the overall employment target of 75% cannot be realized without rapid activation of older men and women currently out of the labour market. To advance this *Strategy*, the *Agenda for New Skills and Jobs* identified the need to address up-skilling in the older workforce as a priority; the *European Social Fund (2014 to 2020)* prioritises investment in active and healthy ageing; and the *European Innovation Partnership on Active and Healthy Ageing* is supporting research on expanding and sustaining active/healthy life span. Despite this pro-ageing policy environment, there is a lack of consideration of the complex multiple demands on older workers which shape the individual decision-making of women and men.

Across the EU recent trends in employment rates of men and women suggest that, while there is an increase in the employment level of older workers (aged 50-64) in the EU by 10% in 2012, the long-term decline in participation rates (especially of men) has not been reversed. There is also significant variation across European countries. For example, in Belgium, France, Slovenia, Greece, Luxembourg, Poland, Croatia and Hungary, fewer than half of older men were in employment in 2012 (Sinclair, Watson, and Beach, 2013). Over the same period, the employment rate of older women workers has been rising in all EU28 countries. In fact, approximately 68% of the female employment growth between 2001-2011 was accounted for by increased employment of women aged 55-64 in EU27 countries (Lewandowski, et al., 2013).

These and other gender differences between older women and men workers have prompted research exploring in greater depth the factors that shape the increased participation rate of older workers and that sustain longer working life. A review by Phillipson and Smith in 2005 identified key factors implicated in extended working life, including: socio-demographic variables (such as marital status, educational qualifications, and socio-economic status); sectoral composition of the economy

(manufacturing vs services); type of employment (self-employment versus wage/salaried work), and financial incentives and disincentives (tax system, social welfare policies, etc.) to continued employment. For individuals, the pressure to work longer is typically due to a gap in the required income for comfortable retirement and the actual benefits received from pensions, either the state, occupational or personal pension. To illustrate this gap, in a survey of employees in UK, three-quarters of respondents said an income of 60% or more of their current wage is required to be ‘comfortable’ in retirement. However, less than half (41%) felt that their pensions would be sufficient to support such a level of income (Sinclair, Watson and Beach, 2013).

Because much of the research literature and policy activity are based on the “big issues”—the premise that extended working life is imperative to meet the interconnected challenges of an ageing population, longer life expectancy post-retirement, rising public expenditures on pensions and declining state revenues, there has only been limited attention paid to a more systematic and finely grained analysis of what extended working life means for older people. There is not enough recognition among policy-makers that older people are not a homogenous group in terms of health, class and opportunities to find or remain in employment. Designing effective policies for facilitating and sustaining extended working life requires a more nuanced analysis from a gender, health and life course perspective, to ensure that equity considerations are taken into account when the “big issues” are discussed. The potential impacts of the widespread introduction of policies extending working life can profoundly affect the well-being of older workers, particularly given the lack of recognition of the critical role of informal care. While some research indicates that extending working life may benefit some workers, it is also the case that it can lead to a growing crisis in the provision of care (formal and informal provision), undermine active ageing in, as yet, unanticipated ways and have potentially severe consequences for the future of welfare states, (Eurofound, 2014).

### **Gender Perspective:**

The gendered impacts of policies to extend working life are critically important, given the significant evidence that gender norms, roles and responsibilities result in specific challenges for older women. Despite the increase in labour force participation, older women workers have relatively poor economic outcomes in terms of earnings, pension-building and employment prospects (Duvvury et al, 2012; Ginn and Macintyre, 2013). Gender discrimination is a common feature of labour markets, leading to the concentration of women and men in different occupations and with women clustered at lower levels with low pay and poor conditions (temporary, seasonal, with low promotion possibilities) (Corsi et al, 2011). One consequence of this is that, according to Bettio et al (2013) in 2009 the gender gap in pension income in EU-27 countries was, on average

39%, ranging from 47% in Luxembourg to 4% in Estonia.

Another issue identified is the intersection of age and gender discrimination where, for example, if women experience gender discrimination early in the life course, this may be compounded by their experience of age-related discrimination later if they try to re-join the workforce or apply for promotion later (Loretto and Vickerstaff, 2010, Trade Unions Council, 2014).

Not only do older men and women have unequal opportunities for labour market participation, there are also unequal expectations in terms of caring. An ageing population has intensified the burden of elder care on older workers in Europe where community level eldercare is underdeveloped and older people themselves do not want to go to residential care. When state provision of care is weak and women are primary carers, such as in Southern European countries, extended working life policies that keep women in paid employment may disturb the balance of work and care provision (Bould and Casaca, 2012). For the sandwich generation, with caring responsibilities for grandchildren and other family members such as ageing parents, women's involvement in such unpaid care work can be limited by extended working life. This could have ripple effects on the labour force involvement of 'prime-age women' (25-44) who have traditionally relied on older women to provide informal care for children.

Women also face biological challenges – women's gender 'advantage' in life expectancy translates into 40% of a woman's adult life being spent in post-exit from the workforce at the current age of 65 (Sinclair, Watson and Beach, 2013). Older women are also at an increased risk of poverty – a study of 2008 EU-SILC data found that among EU 27 countries, older women had a poverty risk rate of about 22% as compared to an older men poverty risk rate of about 16% (Zaidi, 2010). On average, older women are more likely to live in poverty, and for longer periods, than older men.

Both scholars and policy commentators, including trade unions, have identified intersections between gender and age discrimination as posing particular problems for women workers at specific points in their lives (Loretto and Vickerstaff, 2010, Trade Unions Council, 2014). A gendered understanding of the impacts of extended working life would provide a more nuanced picture of the differential consequences for older women and men in range of occupations, sectors, and types of employment. A comparative understanding will be critical to policy-makers seeking to address the inherent gender inequalities that often result in economic, social and physical insecurity for ageing populations.

### **Life course Perspective:**

The order and timings of life transitions, such as moving from education to work to retirement, are vital to understanding the impact of extending working life. A central tenet of a life course research

approach is that “experience of earlier events forms the context of later events and decisions” (Cooke, 2006; Dannefer, 2003). States, through welfare policies, shape the policy context within which life course decisions are made and experienced. The concept of ‘linked-lives’ also reminds us that individuals live in households and communities which condition their willingness and ability to extend their working lives (Bengston et. al. 2012; Hochman and Lewis-Epstein, 2013). Consequently, it is important to examine policies which shape people’s lives at earlier stages, to clearly understand the context for decisions to continue or cease working in later life. For example, research has found that achieving higher levels of education leads to more hours in paid work over a lifetime, despite a later start. This suggests that sustained training and retraining throughout the life course may have a greater effect on increasing employment rates for older workers, rather than an episodic policy focus targeting training for older unemployed people.

Age discrimination is another intrinsic component of extended working life. Researchers have found that age discrimination may prevent older workers from finding or maintaining employment, even when if they wish to do so and have the requisite skill set and capabilities (LeGarrec, 2011; Moore, 2009). The perception of age discrimination, viewed as problematic for older workers in the 20<sup>th</sup> century, has in fact increased according to a 2012 Eurobarometer survey, with 58% of respondents reporting age discrimination as widespread. The study also found a strong link between recent economic crises and increased perception of age discrimination, posing potential barriers to older people seeking later life employment security. Across Europe, older workers are ‘overrepresented’ in the public administration, health and education sectors and have consequently been disproportionately affected by cuts to public spending. Older workers in those sectors will continue to be at risk as long as public spending cuts continue. Another challenge surrounds long-term unemployment and potential reemployment among older age groups. For example, the Draft Joint Employment Report 2009/2010 to the European Council indicated that the main challenge for older workers as a result of the recent economic crisis was trying to find re-employment and overcoming long-term unemployment rather than job loss (Sinclair, Watson and Beach, 2013).

### **Health Perspective:**

Research on early exit from the labour market (that is, before state pension age) consistently and across countries indicates that ill-health and disability are major causes of early retirement. Indeed, in many countries, the numbers of people inactive in the labour market because of health limitations have persistently outnumbered those inactive through unemployment (Vickerstaff et al, 2012). Until recently, incapacity benefits and disability pensions have, in many parts of Europe, provided a “soft landing” for older workers who found managing their health problems and continuing paid

employment difficult. As concerns about the implications of ageing populations have grown, many Governments have sought to reduce access to such benefits, whilst also increasing the ages for state pension eligibility. This combination of policy developments mean there are likely to be larger numbers of older workers in the labour force and more vulnerable older workers trying to combine paid employment with their own long-standing health condition or that of a family member who requires care.

The relationship between health and ability to work is multi-faceted and a clear understanding of the complexities is vital. Whilst it is increasingly understood that work can, in some circumstances for some workers, be good for health, it is also recognized that the quality of the work itself—working conditions and pay/benefits—are important. ‘Bad’ work can be injurious to health and wellbeing (Waddell and Burton, 2006). Women and men working in precarious employment or whose work involves heavy physical labour face particular health-related challenges in extending working life (Vickerstaff, 2010). There are also important social gradients in health outcomes, with class, race, gender, age and social location all influencing individual’s health trajectories (Marmot et al, 2010). An improved comparative understanding of the ways working conditions and policy interventions influence health and wellbeing during extended working lives will provide the evidentiary basis for more effective policy-making. A successful policy agenda to extend working life necessarily must respond to and accommodate the reality that an ageing workforce is also a workforce with more health issues.

### **B.3 Reasons for the Action**

In view of increased demographic ageing and the fact that several governments have rapidly introduced policies designed to extend working life, this Action is timely, with both policy and scientific significance. This Action will help fill a gap in research and policy by providing cross-national gender analysis on extended working life policy. This Action is unique in its interdisciplinary scope and cross-national comparative approach, bringing together scholars in the sociology of employment, gender studies, social policy, feminist economics, health economics, life course and welfare state approaches starting with thirteen COST countries, as well as four international partner countries. It will enable comparison of policies and the spread of the Action beyond the EU will allow the transfer of innovative policy solutions to common policy challenges of population ageing both from COST countries to International Partner Countries and vice versa. Such cross-national analysis is important in order to identify evidence-based policy options appropriate for older workers (men and women) and for those in precarious employment. This

network will also provide an opportunity to exchange knowledge of theoretical developments among researchers and deepen and expand the conceptualisation of a gendered life course approach. It will also provide opportunities for networking and knowledge exchange between researchers, policy-makers and NGOs, thus facilitating the transformation of knowledge into action. It will highlight the issue of older workers and pensions among trade unions and NGOs and inform public debate on this issue. This Action will also support capacity building in the training of researchers in the area of employment studies, gender, health and the life course and provide a new infrastructure for innovative research in these areas.

#### **B.4 Complementarity with other research programmes**

This Action complements and builds upon several current and past programmes. It complements COST Action “IS1402 Ageism” – a multi-national, interdisciplinary Action, which was set up in 2014 to enhance scientific knowledge of and attention to ageism in Europe. While IS1402 considers ageism across a range of areas, this Action brings a sustained multi-disciplinary focus to the entire domain of extended working life, which necessarily involves gender, employment, pensions, unpaid caring, and health. This Action could fruitfully conduct joint workshops on ageism in the workplace with IS1402, thus adding value to both Actions. The Survey of Health Ageing and Retirement in Europe (SHARE) funded by the European Commission (M4) provides data on employment and health in Europe for those aged 50 and over. Proposers of this Action have used SHARE in completed and on-going research projects and SHARE data will comprise one of the foundational empirical pillars of this Action. The multidisciplinary research initiative Families and Societies Project (FP7) aims to investigate the diversity of family forms and life courses in Europe, another project to which the Action will contribute. Activating Senior Potentials in Ageing Europe (FP7-funded) provides yet another area of synergy for this Action, since part of the rationale for extended working lives is the argument that doing so unleashes positive potential within ageing populations.

The current Action builds to some extent on a previous COST Action A34 (2005-2009) entitled ‘*Gender and well-being: interaction between work, family and public policies*’. The added value of the current Action is its focus on gender, ageing and well-being and its concentration on extended working life policies. This COST Action presents an excellent opportunity to debate and collaborate on the issue of informal elder care in terms of its economic and social contribution to the well-being of the elderly and also in terms of its negative effects on carers’ continued participation in the labour market, and of the effects of the burden of eldercare on these women.

## **C. OBJECTIVES AND BENEFITS**

### **C.1 Aim**

The primary objectives of this Action are: (1) To advance scientific knowledge about the gendered impact of extended working life on the health and economic well-being of older workers in Europe, using a cross-national comparative approach and by integrating different disciplines and approaches including gender studies, the sociology of work, feminist economics, social gerontology, life course studies and social policy. (2) To develop collaborations with public policy officials, trade unions, international policy bodies, civil society NGOs, and older workers themselves. This Action is not intended to embark on new data collection, but rather to fully exploit existing data by sharing existing knowledge and developing new gender-sensitive measures of economic well-being and health, and by sharing expertise in the variable construction and analysis using extant life course data instruments. These objectives will be met through the following deliverables: (a) the creation of website that will act as a platform for the Action and become an international ‘hub’<sup>11</sup> for the study of gender-sensitive analysis of employment and pensions policy, connecting a variety of stakeholders including researchers, policy-makers, trade unions, employers and NGOs in the field; (b) the creation of a depository database of gender-sensitive scientific measures and policy tool-kits in relation to extended working life policies, to be publicly available on the platform website; (c) the facilitation of research and dissemination events, including Short Term Scientific Missions (STSMs) and scientific Training Schools (TS) for Early Stage Researchers (ESRs) and established researchers, public conferences and policy workshops hosting experts and relevant stakeholders from COST and International Partner Countries (IPC); (d) a series of publications including scientific reports, conference proceedings, academic publications, collaborative recommendation papers derived from Action Working Groups, and an edited book on gender, health and older workers.

### **C.2 Objectives**

The wider and secondary objectives of this COST Action include:

**(1) To focus closer attention on the topic of extended working life from a gender and life course perspective at academic, public policy and societal levels.**

Existing policy and public discussions lack a careful consideration of the differential experiences of

men and women as well as of different age cohorts (50-64 and 65+). For example, pension reforms that increase retirement age and forge tighter links between formal employment and pension benefits ignoring the disadvantages that women experience in the labour markets, could increase the already high risk of poverty for elderly women.

**(2) To enhance and harmonise gender-sensitive multi-national and multi-disciplinary research in the field of older workers.** Most of the current research in this area is confined to a single country or bi-country context or is conducted from the perspective of one discipline. Yet, this is a policy challenge increasingly facing all affluent developed countries, including those in Europe. This Action provides an ideal mechanism whereby researchers can take advantage of a comparative cross-national research platform to harmonise and disseminate innovative approaches, facilitating the sharing of high quality research.

**(3) To facilitate evidence-based public policy action on extended working life legislation which is sensitive to gender, health and occupational differences.**

Demographic ageing and the extended working life agenda will have a significant impact on the socio-economic well-being and health of older workers throughout Europe and the world. This Action brings together researchers, public policy officials, trade union officials, employers organisations, civil society NGOs in gender and ageing, and older workers themselves to facilitate debate and evidence-based decision-making on the issue of extended working life. An increase in media debate, public policy reports and reforms in public policies and legislation at the national and European levels will indicate that this objective is being fulfilled.

**(4) To encourage the development of ESRs and more established researchers in gender and extended working life.**

There is a relative lack of training and limited research in the application of gender and of life course analysis to the area of employment and existing research is typically confined to individual countries. The training and mentoring of an emerging group of ESRs will be a measurable outcome of this objective.

**(5) Encourage the sustainability of this network beyond the lifetime of this action.**

This Action will provide an important initial platform for continued collaboration in relation to gender and life course analysis of employment and pensions policy for older workers, and for sustained research in the area. Evidence for this will be provided through continued publications,

efforts to obtain financial support and engagement with the topic. The Action will set up sustainable networks with non-research partners to shape public policy and legislation. Action members will monitor these objectives throughout the Action.

### **C.3 How networking within the Action will yield the objectives?**

Two main means of communication will be used to facilitate networking: face-to-face and electronic. Face to face meetings will be through Management Committee (MC) meetings, TSs, conferences, STSMs, and local policy workshops. Electronic communication will be conducted by email, Skype, tele-and video-conferencing and through the Action's website.

The specific networking activities envisaged for each objective are as follows:

**(1) An increased focus on the topic of extended working life from a gender and life course perspective at academic, public policy and societal levels.**

This will be achieved by increasing the numbers and types of participants in the Action, the training of emerging researchers, the development of a website and by holding innovative consultations with a wide range of stakeholders. Diverse publications including policy briefings, publications in academic journals, an edited book and media communications will ensure that Action activities will reach a diverse audience, reaching beyond Action participants. The various countries, disciplines and means of dissemination (newsletters, websites, conferences, media releases) will enable widespread dissemination across national and disciplinary boundaries.

**(2) Enhance and harmonise gender sensitive multi-national and multi-disciplinary research in the field of older workers.** The mechanisms used to achieve this will be: (a) formal and informal discussions at Action meetings; (b) international experts who address Action members on topics related to extended working life; (c) TSs designed to enhance methodological competencies in analysing data and policy, and (d) development of a depository website that includes agreed measures and policy tool-kits, and promulgation of research findings through scientific publications, policy analyses and an edited book.

**(3) Facilitate evidence-based public policy action on extended working life legislation which is sensitive to gender, health and occupational differences, so that this Action takes a central role as the collaborative enterprise for thought-leaders in the worldwide conversation about managing the social implications of population ageing and extending working lives, and can**

**inform public policies that enhance them.** This will be facilitated by: (a) supporting continuing communication between practitioners, researchers, policymakers, trade unions, NGOs and members of the public, including holding stakeholder consultations. At an international level, there will be Action meetings, conferences and electronic communication; there will be activation through existing national, regional and local networks using local workshops and media announcements; (b) production of policy papers on extended working life; and, (c) a TS on public policy on extended working life.

**(4) Encourage the development of ESRs and more established researchers in gender and extended working life.** This goal will be pursued by providing TSs, STSMs as collaborative enterprises and senior scholar mentoring of emerging researchers. Early career researchers will engage in conferences and Action meetings to enact and sustain collaboration with experienced researchers in the field.

**(5) Encourage the sustainability of this network beyond the lifetime of this Action.**

This will be achieved by (a) the development of collaborative networks to submit joint research applications for additional infrastructure support; (b) development of policy position papers and state-of-the art reports and policy tool-kits; (c) sourcing additional funding sources at national and international levels; (d) the establishment of a depository website of measures and policy tool-kits on extended working life policy; and, (e) synergies between this Action and ongoing and future projects in which Action Members are involved.

#### **C.4 Potential impact of the Action**

We envisage the following beneficial impacts at societal, public policy and scientific levels.

**Societal level:** This Action will facilitate researchers, employers, unions, workers, advocacy groups, NGOs and policy-makers to identify gaps in knowledge and develop a responsive research agenda that identifies challenges and innovative solutions associated with extended working life policies, from a gender perspective. This is directly relevant to the EU's aims of reducing age and gender inequalities and encouraging active ageing. It will create research and policy synergies by drawing out the gender and health implications across countries and will inform future policy development for an increasing proportion of the European population. It will provide policy tool-kits for governments and employers and be potentially transformative for older workers. The

Action will also encourage capacity-building and dissemination of knowledge in non-academic settings. Given the worldwide implications of population ageing, the Action will facilitate knowledge-sharing and policy-learning across national boundaries and among academic partners, policy-makers, trades unions, NGOs and civil society. It will stimulate existing and ongoing global debates on the value or otherwise of policies designed to extend working life, learning from and researching in comparative perspective the policies and practices associated with the gendered experience of extended working lives throughout Europe and in other developed countries.

**Public policy:** This Action will focus policy attention on the topic of extended working life policy, particularly insofar as gender similarities and differences are concerned. It will stimulate careful consideration and modification of existing policies, where necessary. The Action will also facilitate policy-makers by providing evidence-based tool-kits that identify state-of-the-field knowledge and best practices, and it will inform and empower members of civil society in relation to gender, employment, and pensions.

**Scientific level:** This Action will boost the level and enhance the quality of research on gender, age and employment; it will provide mechanisms for the training of both emerging and experienced researchers; and it will provide platforms for multi-disciplinary collaborative research programmes and knowledge dissemination. The Action will facilitate the harmonisation of research on ageing by structuring the development and sharing of methodologies and measurement instruments to facilitate cross-national, trans-disciplinary research.

### **C.5 Target groups/end users**

This Action includes both academic and non-academic participants because it aims to influence social scientific research, inform policy, and be useful to civil society at large. Therefore the Action includes researchers active in the fields of social gerontology, sociology of work, gender studies, feminist economics, schools of business and health economics. It also includes non-academic partners include trade unionists, employers' organisations, policy-makers and NGOs from older people's organisations and gender organisations, as well as national and international policy-makers. National and international policy-makers, NGOs, trade unions, older workers and older citizens will particularly benefit from this action in terms of targeted work and pensions policy development.

## **D. SCIENTIFIC PROGRAMME**

### **D.1 Scientific focus**

The focus on employment and pensions policy, both of which are crucial for the sustainability of pension systems and for the economic well-being and health of older workers across western countries, is a major strength of this Action. In line with its objectives, the scientific foci of the Action are as follows: (a) to increase societal, public policy and scientific focus on extended working life; (b) to deepen and coordinate research efforts in the area of extended working life by facilitating the application of gender, health and life course analytic frameworks to these topics; (c) to facilitate the adoption of evidence-based public policy approaches; (d) to develop and strengthen an infrastructure of researchers in the field; and (e) to extend the network of research collaborations and policy relevance beyond the lifetime of this Action.

The Action will focus on four main scientific areas, organised into specific Working Groups (WG). The WGs will be structured as follows:

**WG1** will map existing knowledge and identify critical themes for gender and older workers. Based on a preliminary review of the literature, these themes are likely to include health, caring, work-life trajectories, precarious employment, and the impact of legislation and policy.

**WG2** will have a policy focus and will involve analyses of national 'late work' employment policies from (a) a gender perspective, (b) a life course perspective and (c) a health and well-being perspective.

**WG3** will identify and map national and international databases for people aged 50 and over. It will identify appropriate gender-sensitive measures and indicators for health and socio-economic well-being, or create novel measures through creative use of existing data.

**WG4** will develop policy tool-kits, identifying innovative policies and good practice.

The Action will bring concerted multi-disciplinary attention to bear on the issue of extended working life. Necessary tasks include the identification and dissemination of innovative methodological approaches that build on previous development in terms of gender and the lifecourse. Action members will be assigned to the various working groups, according to interests and expertise. Because the Action is being designed to be inclusive, the precise issues to be addressed within each WG will be determined and prioritized during WG meetings.

Organisation into four Working Groups is pragmatic and should enhance efficiency and facilitate

in-depth investigation into the topics. Clearly, the various issues overlap and the Action is designed to ensure that there will be effective interaction and sharing across the WGs. For example, plenary sessions that allow cross-WG discussion will be timetabled. There will also be presentations of WG reports during the interim and final conferences and at local and international conferences. Work conducted by the WGs will be available on the website and published in academic and non-academic outlets.

## **D.2 Scientific work plan methods and means**

Key specific activities and methods in the scientific workplan include:

- Develop the structure for the website of the project (Year 1).
- Continuously review existing theoretical and empirical literatures (Years 1-4).
- Prepare ‘state-of-the-art’ reports and policy recommendations and toolkits and place them in the public domain through the project’s website (Years 3-4)
- Create a depository for selected measures and interventions and publish it on the project’s website (Years 1-4).
- Present ‘state-of-the-art’ knowledge at the conferences (Years 2 and 4).
- Deliver presentations at local workshops while encouraging ESRs and other professionals to present their experiences and knowledge in the field (Years 1-4).
- Develop research and public policy agendas and research proposals for future collaboration (Years 3-4).

Each WG will review current research activities and evidence related to gender and extended working life; conduct cross-national, multi-disciplinary and comparative reviews of the current knowledge base to identify gaps, strengths, weaknesses, commonalities and differences. Evidence from empirical research on extending working life and overviews of national approaches to accomplishing that will be used to construct policy tool-kits that will be placed onto the website for

public availability. WG members will expand the Action by presenting findings to other researchers and stakeholders at the national and international level. While the first year will be dominantly focused on foundational capacity building within the Action, the expansion will be rolled out through local workshops and international workshops (not necessarily as part of the Action, but related to it), develop partnerships and identify funding sources and publication outlets to disseminate and develop the Action and ensure it is sustained beyond the timespan of the Action. Policy-makers, trade unions, employer organisations, NGOs and older workers will be invited to participate in several activities associated with this Action to enhance the practical application and policy impacts, in addition to its scientific value.

It is expected that the collation and analysis of current research in gender, health and extended working life across the life course will draw together three distinct areas that are often considered in isolation, bringing a unique focus on the cross-cutting issues associated with extended working life and ensuring that cutting-edge methodological approaches will be disseminated across the European research area. The Action will enhance communication among researchers, policy-makers and other stakeholders and the wider society. This will act as a launching pad for the preparation of national and international collaborative grant proposals and will initiate new research on these themes. Communication and sharing of research ideas and findings will take place at WGs and at Action level conferences and will be targeted at the academic community, public policy bodies, older workers and at society in general.

A range of communication techniques will be used for dissemination of the Action's activities:

(a) Members of each WG will meet face-to-face twice per year during WG meetings for parallel sessions. In order to encourage cooperation and sharing of ideas between the WGs, plenary sessions will be held at least once per year at the Annual meeting of the Action at which Action members will share knowledge across WGs. WGs will also, routinely, communicate electronically.

(b) Development of a website will allow for ideas, data, research reports, academic papers and policy tool-kits to be shared and will act as an international virtual knowledge environment for the study of gender and extended working life. The website will be a repository for measures and research protocols, instruments, position papers and minutes of WG meetings. Training School materials will be made available for online learning via the website. As well as facilitating communication between Action members, other social scientists, and policy-makers, the website will also foster communication with the general public.

(c) The online depository database on the Action website will host measurement instruments and policy tool-kits and identify best practices, making these available to researchers, national and international policy-makers, trade unionists and employers' organisations. This will facilitate sharing methodological approaches and data, document a range of policy options used in different countries, and facilitate international comparisons and cross-national policy-learning.

(d) Preparation of academic Training Schools (TSs) for Early Stage Researchers (ESRs) and more established Action members. This will provide opportunities for mentoring and knowledge-sharing between ESRs and established researchers. A total of five TSs will be provided. Each TS will have a particular focus. The first TS will be focussed on the use of systematic reviews in the study of gender, health and extended working life. This will help WGs prepare for reviewing and assessing existing literature. The second TS will offer training in the identification, assessment and analysis of existing national and international data sets. The third TS will offer training in policy analysis. The fourth training school will provide training in the application of gender-budgeting approaches and a life course approach (including to analysis of older workers measuring economic well-being and health (quality of life) outcomes. A fifth TS will be on policy dissemination – how to link research, policy and practice.

(e) Several Short Term Scientific Missions (STSMs) will be conducted each year in order to broaden the experiences of ESRs and to promote a European and eventually worldwide network on extended working life.

(f) Two stakeholder consultations and two international conferences on the topic of extended working life will be organised during the Action. The stakeholder consultations will involve government policy makers from the COST Action countries, employers organisations, trade union, advocacy NGOs focused on issues of older workers and gender equality, international organisations, and individual older workers with the objective of refining the key themes of the Action through a bottom-up process of ownership. Additionally the Action will organise two international conferences to facilitate the development of collaborative research networks and develop a cross-national, comparative analysis of extended working life and will extend public awareness of the importance of such policy changes. The conferences will be dominated by researchers focused on the European challenge of extending working life, but will also feature researchers who are exploring similar challenges North America, Asia, and elsewhere. The conferences will be open to

the public.

(g) Local workshops focused on specific topics such as pensions or health and extended working life, or gender and late work will be held and relevant stakeholders (employers, trade unions, NGOs on ageing and gender) will be invited to increase public awareness on these issues.

(h) Media communication, including the extensive use of social media, at local and European levels will be engaged to encourage lively public debate in relation to the gender and health impacts of extended working life.

(i) Collaborative papers from each WG, reports, proceedings, academic publications, an edited book and policy and recommendation papers will document and disseminate state-of-the-field knowledge about extended working life. These outputs will stimulate increased public attention to the topic of extended working life and foster international research and policy development.

## **E. ORGANISATION**

### **E.1 Coordination and organisation**

This Action will include experts from several disciplines – social gerontology, sociology of work, gender studies, health sciences, feminist economics, and researchers involved in the Action will come from several COST countries, research institutes and NGOs. Trade Unions and employers' organisations will provide advice and assist with wide dissemination of the Action's intellectual and policy outputs. National and international policy bodies will provide advice and ensure European-wide and worldwide dissemination of findings. The basis for collaboration is: (a) a mutual interest in gender and older workers; (b) diverse theoretical backgrounds (e.g. sociology of work, feminist economics, social gerontology, gender studies, health, life course studies, psychology, management and organisation); (c) diverse national origins in terms of welfare state policies, austerity; (d) high quality of research; and (e) the desirability of bringing researchers into dialogue with policy-makers, civic and stakeholder organisations.

This Action will adopt the typical COST Management structure. The Management Committee (MC) comprised of up to two representatives from each of the participating countries will supervise and monitor the progress of the Action, coordinate annual reports, supervise budget allocation and evaluate new applicants. At the initial meeting, the MC will set up the Steering Committee (SC),

WGs, Dissemination Board and Website Committee. The MC will meet every six months. The Steering Committee (SC) will direct the methodological framework of the WGs and STSMs. This SC will be made up of the Chair and Vice Chair of this Action and the Leaders of each WG. The SC will meet every 3 months either in person or through electronic means (e.g. video- or tele-conference).

WG Leaders will be nominated at the first MC meeting. The WGs will direct and implement the scientific programme outlined above. Each WG Leader will be responsible for coordinating and reporting the WGs activities. Activities across the four WGs will involve a critical review of research literature, identification and analysis of data-sets, cross-national comparative reviews of policy, training in gender and life course analysis, and identification of strengths and gaps in research and methodology. They will make evidence-based recommendations for future research and practice. WGs will present their work during regularly scheduled Action conferences as well as at a range of international and local workshops, academic meetings, and conferences. WGs will meet at least twice a year and electronic communications (email, Skype) will be encouraged.

A dissemination board (DB) will be responsible for disseminating reports and research papers to the research community, to policy-makers and to the public. The DB will consist of the Steering Committee and other interested members and will meet at least every three months electronically or in person. Subcommittees will be formed within the DB in order to provide it with logistic support.

A website committee (WC) will manage the development and maintenance of the Action website. A conference committee will be responsible for the scientific, logistic, and administrative development of the conferences. A TS committee will be responsible for designing and organising TSs. These subcommittees will include representatives from each WG. Subcommittees will meet inperson every six months, during regularly scheduled Action meetings. More frequent electronic communication will be accomplished as necessary to meet specific milestones associated with the tasks of the various committees.

Progress and achievement of Action objectives will be monitored on an annual basis. The WGs, DB and WC will each submit a short annual report on activities to the MC, who will compile and approve an annual Action progress report measuring the year's activities against the Action's scientific programme and deliverables, and making observations and recommendations as necessary.

## **E.2 Working Groups**

There is a description of the WGs in Section D1.

## **E.3 Liaison and interaction with other research programmes**

The Action will develop collaborative relationships with existing networks and research projects funded by national and international sponsors. Members of existing relevant networks and research projects will be invited to participate in this Action. International experts will be invited to give presentations at TSs and conferences. An obvious example is the COST Action on Ageism with which this Action could share joint workshops on the impact of ageist discrimination in the workplace. Since extended working life is not exclusively a European challenge, scholars from North America and the Antipodes will be included to ensure that this Action is a central player in the worldwide debate about the issue. It offers the potential to link collaboratively in order to bid for research funded in non-European countries for parallel research projects.

## **E.4 Gender balance and involvement of early-stage researchers**

Care will be taken to encourage an even gender balance. To further encourage the participation of ESRs and the development of a critical mass of researchers in gender and extended working life, the following initiatives will be implemented; (a) two STSMs will be arranged each year to support ESRs to interact with and learn from more experienced researchers; (b) TSs that offer training in theoretical, methodological, techniques of quantitative and qualitative data analysis and policy analysis will be provided both to ESRs and other researchers. The WGs will provide a structured environment within which mentoring and guidance will be offered to new researchers. ESRs will gain experience of project leadership by participating in WG meetings and plenary sessions. ESRs will be encouraged to present at conferences and local workshops. The website will be a repository for scientific and policy materials on extended working life and will highlight recommended funding schemes for ESRs and senior researchers.

## F. TIMETABLE

Networking Activities	Months 0-6	Months 6-12	Months 12-18	Months 18-24	Months 24-30	Months 30-36	Months 36-42	Months 42-48
WG meeting	X	X	X	X	X	X	X	X
MC meeting	X	X	X	X	X	X	X	X
Annual meeting of Action		X		X		X		X
Pilot Stakeholder Consultation		X	X				X	
International Conference				X				X
Training School		X		X		X		X
STSM	1	3	2	2	2	2	2	2
Local workshops	2	2	2	2	2	2	2	2

The total duration of this Action is four years (48 months). In order to reduce costs and maximise efficiency, some events will be combined (e.g. WG meetings and MC meetings/Annual Meetings). SC meetings will take place sometimes electronically and sometimes concurrently with MC meetings.

### **Expected annual outcomes:**

Year 1: website design. WG's review & publication strategy; WG's report; TS materials uploaded and available on web.

Year 2: Reports and materials made available to public on website. WGs' reports, and TS materials available via the web; interim conference proceedings; media announcements.

Year 3: Reports and materials uploaded on website; 3rd TS materials available via the web; publications in peer-reviewed journals; media announcements.

Year 4: Reports and materials made available to public on website. 3rd TS materials available via the web. Publications in peer-reviewed journals and special editions; policy reports; collaborative grant applications; conference proceedings; an edited book; media announcements.

## **G. ECONOMIC DIMENSION**

The following COST countries have actively participated in the preparation of the Action or otherwise indicated their interest: AT, BG, CH, DE, ES, FI, FR, IE, IT, PL, PT, SE, UK. On the basis of national estimates, the economic dimension of the activities to be carried out under the Action has been estimated at 52 Million € for the total duration of the Action. This estimate is valid under the assumption that all the countries mentioned above but no other countries will participate in the Action. Any departure from this will change the total cost accordingly.

## **H. DISSEMINATION PLAN**

### **H.1 Who?**

This Action is targeted at five different groups of end-users.

#### **1. Researchers**

This Action will bring together researchers from different countries and from diverse disciplines including social gerontology, gender studies, sociology of work, and organisation, economics and the discipline of health, and life course studies. Policy-makers, NGOs, trade unionists, employers, international policy bodies and older citizens may also participate. This collaboration across disciplinary, theoretical and methodological boundaries and for different audiences and actors will enable a unique and concentrated focus which is empirically informed and scientifically rigorous.

There will be a concentrated effort to involve ESRs and PhD students through STSMs, development of several TSs and mentoring. This inclusive approach will benefit the research community.

## **2. Policy-makers and NGOs**

The Action will provide obvious benefits at European policy level and to national policy-makers by providing collaboration with researchers on policy papers and ‘state-of-the-art’ reports that reflect thorough and up-to-date reviews of the evidence associated with policy approaches to meeting the challenges of extended working life in ageing populations. It will provide a unique opportunity for evidence-based research to feed directly into policy and practice at national and international levels. The policy tool-kits will provide a resource for policymakers across COST countries. The fact that European policy agencies and national gender equality agencies are involved in preparing the network shows that this dialogue has already begun and will be enhanced by drawing in more such bodies.

## **3. Trade Unions and Employers**

The involvement of national trade unions and employer bodies will facilitate the translation of policy into practice within and across employment organisations. Both trade unions and employers are key players in extended working lives, whose cooperation will be essential to accomplishing high quality jobs for older workers. They will be invited to participate in the Action and to attend national and international workshops and conferences. They will also benefit from having access to the website which will include scientific and position papers and recommended measures and policy tool-kits.

## **4. Older workers (and younger workers)**

Older workers will benefit from having an enhanced awareness of employment and pensions policy and will be invited to participate in conferences and international and local conferences. They will also benefit from having access to reports, policy toolkits and position papers on the website. Younger workers will benefit by having these issues discussed in an informed way, thus allowing them to make informed decisions about their own futures in relation to employment, retirement and pensions.

## **5. Civil society**

Civil society will benefit from the increased opportunities for public debate on this issue of extended working life which is of increasing global importance. Public discussion will facilitate

enhanced intergenerational dialogue on the issue.

## **H.2 What?**

Three main methods will be used for dissemination: (a) electronic communication, (b) publications and (c) face-to-face contact.

1. Information about the Action will be posted on the dedicated website and it will be used to invite potential stakeholders to take part in local workshops, conferences and TSs. The website will also house WG summaries and state-of-the-art reports. Working papers and other work in progress will be available to Action members using a password.
2. E-mail, video- and tele-conferencing, and Skype will be used to enable ongoing communication between Action members.
3. Media communication and public announcements will be made by WG members in order to increase public attention and debate to extended working life policy. Social media including blogs, Twitter and LinkedIn will be used to maximise debate and dissemination.

Dissemination through publications will include the following:

1. Working papers
2. Policy Reports and Executive summaries
3. Scientific reports
4. WG proceedings
5. Scientific publications
6. Policy toolkits
7. Edited book
8. Accessible reports for lay publics, including older/younger workers

### **Face-to-face dissemination will occur as follows:**

1. MC and WG meetings will take place at least twice per year and will facilitate communication among Action members.
2. An interim and concluding conference will be organised to enable Action Members to share insights. These conferences will be promoted to international experts, public policy officials, NGOs, trade unions and employers to facilitate communication between the partners and forge links between research, policy and action.

3. TSs will be offered in order to strengthen gender-informed policy analysis; offer training in gender-aware analysis of health impacts and socio-economic impacts using a life-course approach; strengthen the methodological foundations of research on extended working life. Both ESRs and more advanced researchers may avail of training and bring this to their work.
4. STSMs will facilitate the mobility of ESRs and offer them an opportunity to interact with more advanced researchers.
5. Local workshops will be set up by WG members to connect the goals and activities of the Action with local stakeholders.

### **H.3 How?**

A dissemination board (DB) will be established at the start of the Action. Three subcommittees will be responsible for the setting up and maintenance of a designated website, and set up social media, the organisation and preparation of TSs and the organisation and preparation of the interim and concluding conferences. (See E1 for details).

This Action aims to impact broad and diverse audiences in terms of geographical location, disciplinary school, national and international policy communities, trade unions, employers, NGOs and workers. In order to facilitate dissemination, a designated TS will focus on translating research findings and policy reports for accessible public consumption.

A designated website will be a major source of communication and dissemination of information both among Action member and the general public. The website will store all the outputs and activities of this Action and these will be publically available. Password protection will be used to protect work in progress.

E-mail, Skype and tele-conferencing will be used to facilitate communication among action members.

Since this is an issue of major public policy importance, full use will be made of social media, including Facebook, blogs and Twitter to encourage public debate and discussion.

WGs will produce proceedings, research reports and state-of-the-art papers.

WGs will communicate their findings at local workshops and disseminate them at international conferences. WG members will publicise these events through other related research networks to which Action members belong.

TSs will be organised and prepared by the TS subcommittee. TSs will include experts in the field in addition to Action members. The TSs will be advertised via the web, media reports, social media and through the personal network of the Action members.

STSMs will be offered to ESRs who are interested in expanding their research network by gaining experience at established research labs. STSMs will be advertised on the web and through the related research networks of Action members as well as through social media  
Media communication, public announcements and social media will be deployed in order to bring the topic of extended working life and pensions to public debate and discussion.