



MOPACT – Mobilising the Potential of Active Ageing in Europe Extending Working Lives and Lifelong Learning Final Country Report: Poland

Based on (in chronological order):

- **Styczynska, Izabela (2013):** National report for the conceptual framework on innovative, effective, sustainable, and transferable strategies to enhance the extension of working life and lifelong learning. Country: Poland.
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- **Bauknecht, Jürgen /Beaumont, Karolina / Styczynska, Izabela (2015):** National Policy Report Poland. In: Naegele, G./Bauknecht, J. (eds., 2015): National Policy Report. MOPACT WP3
- **Bauknecht, Jürgen / Naegele, Gerd (2015):** Report on Case Studies. MOPACT WP3. Based on contributions by Mikkel Barslund, Carina Bössing, Andreas Cebulla, Katrin Gasior, Nathan Hudson-Sharp, Veronika Khýrová, Katja Linnenschmidt, Elisa Martelluci, Julija Moskvina, Liina Osila, Ana Rincon-Aznar, Agnès Romanini, Marco Socci, Izabela Styczyńska, Lucie Vidovičová, David Wilkinson, Eszter Zolyomi
- **Beaumont, Karolina / Styczynska, Izabela (2015):** Identifying and assessing structural drivers of and barriers to innovative, sustainable strategies for extending working lives and lifelong learning on the demand and supply side. National Report Poland.

And comments by Jürgen Bauknecht and Gerhard Naegele.

Composed and structured by **Vera Gerling.**

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Reading Guidance

This final country report Poland is a composition of several documents that were written in the context of the European Union (EU) project for MOPACT – Mobilising the Potential of Active Ageing in Europe. MOPACT is a four-year project funded by the European Commission under the 7th Framework Programme.

The chapters are based on several reports and additional research:

1. Summary

The summary was written by Dr. Vera Gerling and provides an overview of each of the following sections.

2. Basic Demographic Information

This chapter is based on the additional research by Dr. Vera Gerling (2.1-2.5) and on the national report for the conceptual framework on innovative, effective, sustainable, and transferable strategies to enhance the extension of working life and lifelong learning; Country: Poland written in September 2013 by Izabela Styczynska as result of WP 3 Task 1 (2.6).

3. Extending Working Lives and Lifelong Learning: National Policies

The introduction (3.1) is also based on the national report for the conceptual framework on innovative, effective, sustainable, and transferable strategies to enhance the extension of working life and lifelong learning; Country: Poland written by Izabela Styczynska in September 2013 as result of WP 3 Task 1.

The remaining sections (3.2-3.10) are an extract of the National Policy Report written by Gerd Naegele and Jürgen Bauknecht in February 2015 as a result of WP 3 Task 2.

4. Extending Working Lives and Lifelong Learning: Selected Innovative and Sustainable Approaches

The models of good practice were identified by Izabela Styczynska and comprise good practices on both the labour supply and labour demand sides. The text stems from the National Policy Report written by Gerd Naegele and Jürgen Bauknecht in February 2015 as a result of WP 3 Task 2.

The models of good practice themselves are drawn from the report of Mikkel Barslund et al. written in February 2015, Extended Working Lives – Good Practice Cases, MOPACT project, WP 3 Task 2.

5. Extending Working Lives and Lifelong Learning: Drivers and Barriers

This chapter is based on the National Report Poland, written by Izabela Styczynska, identifying and assessing the structural drivers of and barriers to innovative, sustainable strategies for extending working lives and lifelong learning on the demand and supply side as a result of WP 4 Task 4.

Regarding the macro level, only a brief summary and author recommendations are given, as the policy and meso levels are described in detail in Chapter 3.

1. Summary

Basic Demographic Information

In 2014, the population of Poland was 38.4 million people, of which 18.6 million were male, and 19.8 million were female. Approximately 14.9% of the population were aged 65+. The unemployment rate was 8.6% of the total labour force (8.1% for males and 9.3% for females), and the long-term unemployment rate was 36.2%. The self-employment rate was 21.3%.

Older Workers

Overall, the employment rate for people aged 55-64 has increased from 36.7% in 2010 to 46.9% in 2015, which is encouraging, but still under the EU average of 53.7%. Poland is among the countries with the lowest employment rate among the elderly. The older the age group, the lower the employment rate is.

Classification as “Early” or “Late Movers”

When compared with other European countries, Poland is a “late mover” in terms of willingness and ability to manage the older workforce both at the macro and the meso levels, and in terms of promoting age management policies and the employability and workability of older workers.

Predominant Concept of “Active Ageing”

The discussion of active ageing policies in employment in Poland started relatively late. During the transition from a centrally planned to a market economy at the beginning of 1990s, Poland had to rapidly develop democratic institutions and a free market economy. Questions related to an ageing society were postponed.

After EU accession, as a member of the EU, Poland had to adjust its policies to the goals and priorities of the EU, which included active ageing. The first attempt in preventing the elderly from leaving the labour market early was the governmental programme called 50 Plus, established in 2003 by the Ministry of Labour and Social Policy. Solidarity between Generations, which began in 2008, was the first comprehensive and structured attempt to mobilise the potential of seniors in Poland.

The intensive implementation of active ageing policies in Poland started in 2012 during the European Year of Active Ageing. The Ministry of Labour and Social Policy introduced a major programme, the Governmental Programme of Social Activity for the Elderly (ASOS) for 2012-2013. The main aim of the programme was to create the conditions for the elderly to stay active in societal and economic life longer. The programme had four priorities for the elderly: 1) education; 2) civic engagement promoting inter- and intra-generational activity; 3) social participation; and 4) social services.

A second edition of the programme was created for 2014-2020. It is assumed to be the next large, comprehensive, and structured mid-term programme to mobilise seniors after Solidarity between Generations.

Predominant Concept of “Social Innovation”

In Poland, social innovation is not defined in any national and/or regional document, although it is not a completely new concept.

Interviews with representatives of the Ministry of Labour and Social Policy have confirmed that the concept of social innovation is of particular importance in recent discussions of active ageing policy reform in Poland.

General Programs and Outcomes

The ASOS programme under the Ministry of Labour, Family and Social Affairs (MLFSA) is a flagship programme addressed to finance broad initiatives within the active ageing activities. Activities are divided into four priorities: education of the elderly; social activities promoting social inclusion among the elderly; social participation and social services for the elderly. For the first time the programme was introduced in 2012, during the European Year of Active Ageing. After a year it was evaluated as a very successful project by many beneficiaries and diverse stakeholders taking part in the programme. Representatives of the MLFSA recognized the huge interest in the programme at the regional and local level, and therefore they introduced the second round of the ASOS programme for years 2014-2020.

No evaluation of the programme has been performed until 2017.

The Solidarity between Generations programme attempted to raise the employment rate of older workers based on the idea that early retirement increases social spending and, therefore, necessitates higher taxes and contributions with negative effects on the employment of younger cohorts.

The long-term effects of the programme are difficult to assess as the last evaluation to-date was completed in June 2010 and includes an analysis of programme achievements over two years time. However, the short-term success of the programme lies in the fact that it has been implemented at the regional and local level, because local institutions are closer to people than policies implemented for the whole country at the national level and are more likely to identify the drivers and barriers to the implementation of these policies.

Public Pension and Retirement Policies

Most elderly Poles retire at the statutory retirement age. This age has been raised from 60 for women and 65 for men to 67 for both (in 2020 for men and 2040 for women) in 2015. Two years after the implementation of the reform, the new government withdrew from it, and introduced a new reform at the end of 2016, where the retirement ages were reinstated. From October 2017 the statutory retirement age is 60 for women, and 65 for men.

The average retirement age in Poland is extraordinarily low and is explained by advantageous early retirement regulations for some professional groups inherited from the communist era, such as for policemen, teachers, railwaymen, and miners (miners also in Germany), and in some special health-impairing sectors such as steel production, energy production, and construction.

In order to limit early labour market withdrawal, the Solidarity between Generations programme limited entitlements to "bridging pensions". Coming into effect in 2009, these bridging pensions were a temporary solution replacing early retirement. Bridging pensions were available to men

(60+) and women (55+) working under special conditions or performing work of a special character and who were included on an official government list of types of professions prepared by occupational health specialists.

Partial Retirement / Partial Pension Policies

Given that older workers are in favour of part-time jobs (also due to early retirement schemes allowing high incomes from work), labour-code reforms that allow for more flexibility have been proposed.

Nevertheless, the new pension reform introduced at the end of 2016 forbids any type of work activity, if a person retires at the age of 60 for women and 65 for men.

Promoting Self-Employment

The Operational Programme for Human Capital Development addresses the issue of self-employment. Measures are offers of training and professional assistance and subsidies. The programme Active Women (Aktywna kobieta) was launched in 2007 and targets women 50+. Besides training offers (especially in occupations with labour market shortages), the programme promotes self-employment.

Unemployment Policies and Employment Protection

In contrast to neighbouring countries such as the Czech Republic and Hungary, Polish unemployment policies used to be passive until 2004. After EU accession, Polish labour market policies became far more active, also thanks to financial resources from European structural funds.

The duration of earnings-related unemployment benefits can be 6, 12, or 18 months and depends on the regional unemployment rate, the age of the unemployed, the length of previous work, and family circumstances (the higher the level of regional unemployment, the later eligibility expires). Standard flat-rate benefits are very low (in 2008, the benefit was €132, which was 49% of the minimum wage or 19% of the average wage) so that there are no or negligible financial disincentive effects after the expiration of earnings-related benefits.

Under the Solidarity between Generations programme, employers are motivated to employ those over 50 by several measures.

Since 2004, employers are no longer allowed to dismiss workers in the four years preceding the legal retirement age.

There are legal regulations intended to protect those over 45 or 50 from job loss and to help them to find work in case of unemployment. A great debate is now taking place at the national level on whether this protection is effective and brings the assumed results. It has been observed that employers now dismiss workers just before they enter the protection period. Employees such as this are in very difficult positions to find employment. They are the first to leave the market, and increase labour market inactivity in Poland.

Health Protection and Promotion, Prevention of Disability

In Poland, poor health is the main reason for leaving the labour market early, and comparative

data show that the health of adult Poles is worse than the average health of adults in other European countries. In 2011, among 17 European countries, Poland ranked second (first: Hungary) in the percentage of those aged 50-64 with “one or more mobility, arm function, and fine motor limitations” and “two or more chronic diseases”.

The 2008 programme Solidarity between Generations incorporated the concept of healthy ageing for the first time. Among the several measures of this programme are increased efforts to activate the disabled, for example, through legal frameworks for occupational rehabilitation and awareness campaigns for employers about the advantages of employing disabled workers.

Work-Life Balance Policies

The Solidarity between Generations programme contains opportunities for women to combine work and family, for example, with simpler rules for the opening of new kindergartens and the support of a kindergarten net especially in rural areas (financed also by the European Social Fund) and the possibility for companies to finance company kindergartens from the company’s social benefit fund.

Anti-Discrimination Legislation

The programme Solidarity between Generations attempted to alleviate negative age stereotypes by highlighting the advantages of older workers, spreading age management knowledge, showing that age management is not costly, and implementing age management programs in companies. The programme is supplemented by the recommendations prepared by the Programme Council 50 Plus on the development of a less hostile corporate culture and work environment for employees over 50.

Extending Working Lives and Lifelong Learning: Good Practices

Measures and approaches aimed at supporting the professional activation of people aged 50+ have several addressees. Almost half are addressed to public institutions and regional governments. The rest are directed at individuals and employers.

The activities can be grouped into five objectives:

- Improvement of qualifications and skills of people aged 45+ in accordance with labour market needs;
- Creation of less hostile corporate cultures and work environments for older employees;
- Increasing the efficiency of activities aimed at promoting employment and professional activity;
- Supporting the idea of active and healthy ageing; and
- Developing cooperation aimed at improving the participation of people over 50.

The first objective includes activities related to the training and education of the elderly. It supports life-long learning (LLL) activities (promotion, educational counselling, between-generational cooperation, and provision of trainings). One activity of an innovative character is the support of the sustainable cooperation of employers with educational institutions in shaping the educational and development offers for people over 45. The second interesting activity

under this objective supports an increase of the awareness and attractiveness of the employment of the elderly among small and medium enterprises (SMEs). Measures under this objective are addressed to employed and unemployed people aged 45+ as well as employers.

The second objective includes activities enforcing the development of career planning systems in companies, the improvement of working conditions, and the implementation of systemic solutions aimed at encouraging employers to retain people aged 50+. They are mainly addressed to employers.

The objective focused on healthy and active ageing (objective four) is very broad in scope and is addressed not only to the elderly, but also to the entire public. Activities implemented under this topic are related not only to economic activity, but also to other broad forms of social, cultural, and educational activities.

The third and fifth objectives are addressed to public institutions and regional authorities. They aim to increase the promotion of the employment of the elderly and to build cooperation between public institutions and social partners.

Many of the measures described above reflect the opportunity to introduce foreign good practices to the field of mobilising older workers in Poland both on the demand and the supply side. Special attention is given to disabled as part of the target group which has specific needs for better engagement in the labour market. However, other horizontal dimensions, like gender equality, are often missing.

The approach presented is evolving over time. Despite the fact that no evaluations are implemented, public authorities analyse the demand and the needs of public institutions, regional governments, and institutions of third sector, and adapt approaches according to their requests. Public debate initiated by Polish Ministry of Labour and Social Policy, especially in the field of extending the working lives of the elderly, is broadly used and commonly accepted by all social partners. Therefore, topics neglected in the past are now being discussed and implemented.

Money is an important topic in implementing programs. This overview has shown that the majority of the approaches use funding from the European Social Fund. Some can also be financed from the Regional Operational Programme. Additionally, national funds from the Polish Ministry of Labour and Social Policy are available (e.g. the ASOS programme).

In summary, despite the fact that the concept of active ageing was created relatively late in Poland and that the majority of actions have been initiated at the local level, by the third sector, or by local governments, public authorities have managed very smoothly to create national programs of a coherent character with common aims and indicators.

Extending Working Lives and Lifelong Learning: Drivers and Barriers

Workability / Employability: Motivation

The participation of older people in the labour market faces obstacles to its fulfilment, such as the reluctance of employers to hire older people, a lack of flexibility in working conditions, labour market segmentation, and the incidence of negative stereotypes and ageism. Given these obstacles, at the macro level, policy responses have been implemented at the national and

local level by the Polish government to address them in a holistic way.

The Solidarity between Generations programme implemented several policies and innovative initiatives towards efficient and successful active ageing in the field of employability, which have been implemented at various levels—at the national and local levels, as well as in the private sector through the internal policies of many companies. At the regional level, the programme implemented innovative initiatives aimed at fulfilling the programme's sub-goals, such as the improvement of working conditions and the dissemination of knowledge among employers on the topic of age management. The programme also implemented initiatives through multi-institutional cooperation. Furthermore, there are additional local initiatives.

Workability / Employability: Health

The healthcare system still suffers from the communist times in the sense that it lacks modernisation. The specialty of gerontology is very rare in some city hospitals and, thus, older people cannot benefit from adequate care.

The Solidarity between Generations programme also aimed at improving the mental and physical health conditions of older people in order to improve their quality of life. The programme applied integrated preventive measures aimed at improving health conditions, notably through the early diagnosis of chronic diseases; the building of an identification system for medical treatments enabling prevention; the monitoring of the inability to work; and the encouragement of older workers' choice for private healthcare. However, no concrete initiatives were identified in the framework of this programme, which shows, to a certain extent, a lack of coordination between the creating and implementing institutions.

At the meso level, it can be noticed that many international companies based in Poland provide their employees with health services. For example, ArcelorMittal, in which 48% of employees are aged 50+, provides direct access to psychologists, psychotherapists, psychiatrists, financial counsellors, professional advisors, and social workers for its 12,000 workers. It also organises a "health week" once a year, with campaigns and assistance aimed at quitting smoking, raising awareness about the physical changes people experience after age 50, and promoting physical activity.

Workability / Employability: Life-Cycle Orientation

The focus on family issues in a life-cycle perspective is a crucial subject, in addition to health and employability, because it has a direct impact on the elderly's employment rate and participation in social and political activities. Indeed, since today's younger generation is tomorrow's seniors, the issues of active and healthy ageing and extending working lives must be approached from the youngest age possible and in a life-cycle perspective and a holistic approach. Poland takes progressive and improving measures in the field of family policy to boost employability and facilitate work-life balance.

The initiatives *Archipelag Pokoleń* (eng. Archipelago of Generations) - implemented under the ASOS programme) and *Świętokrzyska Ekonomia Społeczna* (eng. Voivodship Social Economy) (a regional socio-economic programme) are good examples of such initiatives, bringing older people and students from middle school together to discuss different topics, including

social issues (e.g. gender identity, digitalisation, city space management, and religion, among others) under the first programme, and the social economy under the second.

The programs *Partnerstwo –rodzina –równość –praca* and *Elastyczny Pracownik – Partnerska Rodzina*, (eng: Partnership – family- equality- work and flexible employee – Partnership Family) part of the 2004-2009 programme Equality of Opportunities on the Labour Market for the 50+, funded by the European Social Fund, were aimed at people aged 45+ and with the objective of enabling an effective work-life balance.

Workability / Employability: Lifelong Learning

The LLL of the elderly in Poland is a concept still under development, not only because of insufficient policies implemented in this field, but also as a result of the attitudes of the elderly. Polish seniors have among the lowest rates of participation in LLL activities in Europe.

One of the goals of Solidarity between Generations is to improve the skills and professional competencies of people aged 50+, but through measures also addressing younger generations, in the perspective of a life-cycle approach. Therefore, the programme encouraged initiatives building educational paths for the elderly, with the provision of individualised professional assistance aimed at guiding the beneficiary in choosing educational training and motivating him/her in pursuing educational goals. Moreover, the programme supported LLL activities at the regional level and was addressed to people at risk of unemployment.

The key institutions offering LLL in Poland are the Universities of the Third Age, totalling 450 in Poland and offering a wide range of educational programs, social activities, and skills development, local cultural offices, social assistance homes, non-governmental organisations (NGOs), and senior clubs, among others, which demonstrates the investment in elderly education and LLL of policymakers. In Poland, the topics that are getting the most interest among the attendees of Universities of the Third Age are medicine, dietetics, and naturopathy.

(Sustainable, Real) Self-Employment

Self-employment and entrepreneurship are benefitting from high popularity among older people.

The encouragement and stimulation of self-employment and entrepreneurship among people aged 50+ have been the priorities of the Operational Programme for Human Capital Development through its offer of trainings and individual professional assistance and coaching. Roughly 200,000 persons benefitted from the programme between 2007-2011 and 50,000 created their own business within six months after participating in the project.

Regarding female entrepreneurship, many programs have been implemented to support businesses among women aged 50+. Among them, the programme Active Woman, launched in 2007, targeted the promotion of female entrepreneurship for women aged 50+.

A special focus has also been given to the development of entrepreneurship among people aged 50+ in rural areas.

Work beyond Legal Retirement Age

Despite the tremendous improvements of the past decades, Polish salaries and standards of

living remain lower than in other EU countries, and retirement pensions are quite low. Thus, working beyond retirement age can be seen as a requirement for many Poles. However, a survey stated that the first reason for older Poles to work beyond retirement age is the wish to keep active.

Demand Side

Poland has not proposed any socially innovative policies in the area of financial or non-financial incentives for the employment of older workers. Thus, it is impossible to analyse barriers and drivers in this respect. Social innovation is still far from covering all aspects of active ageing and is a concept still under development in Poland in comparison to Western countries.

Despite the fact that the government offers financing for socially innovative projects, there are a few weaknesses, as described above, in the different areas of active ageing policy. There seems to be an overall need for increasing trust and cooperation in the implementation of active ageing programs in order for them to remain socially innovative and to be attractive for the target group of people aged 50+.

2. Basic Demographic Information

The following information is primarily drawn from OECD statistics.

2.1 Population and Age Structure

In 2014, Poland had a population of 38.4 million people, of which 18.6 million were male and 19.8 million were female (OECD 2016a). Approximately 14.9% were aged 65+, and of the 5.7 million people aged 65+, 2.2 million were male and 3.5 million were female (OECD 2016b). The elderly dependency rate (65+) in Poland was 21.4% (OECD 2016i).

2.2 Life Expectancy

In 2014, the life expectancy¹ for a newborn in Poland was 73.7 years for a male and 81.7 years for a female (with an average of 77.7 years among newborns) (OECD 2016c). The life expectancy for a person aged 65² was 15.9 years for males and 20.4 years for females (OECD 2016d).

2.3 Fertility Rate

The fertility rate in Poland was 1.29 in 2014 (OECD 2016e).

2.4 Unemployment Rate

In 2014, the unemployment rate³ was 8.6% of the total labour force—8.1% for males and 9.3% for females (OECD 2016f). The long-term unemployment rate⁴ was 36.2% (OECD 2016g).

2.5 Self-Employment Rate

The self-employment rate in Poland was 21.3% in 2014 (OECD 2016h).

2.6 Older Worker Employment / Unemployment Rates

Overall, the employment rate for people aged 55-64 has increased from 36.7% in 2010 to 46.9% in 2015, which is encouraging, but still under the EU average of 53.7%. The gender segregated data shows significant discrepancies between men and women in this context, as the employment rate for men increased from 48.9% in 2010 to 57.6% in 2015 and from 25.9% in 2010 to 37.3% in 2015 for women. Compared with the EU average of 65% for men in 2015 and 50% for women, Poland is among the EU countries with the lowest employment rates among people aged 55-64.⁵ Graph 1 below shows the employment rates of the elderly in EU-

¹ Life expectancy at birth is defined as how long, on average, a newborn can expect to live if current death rates do not change. However, the actual age-specific death rate of any particular birth cohort cannot be known in advance.

² Life expectancy at age 65 is the average number of years that a person at that age can be expected to live, assuming that age-specific mortality levels remain constant.

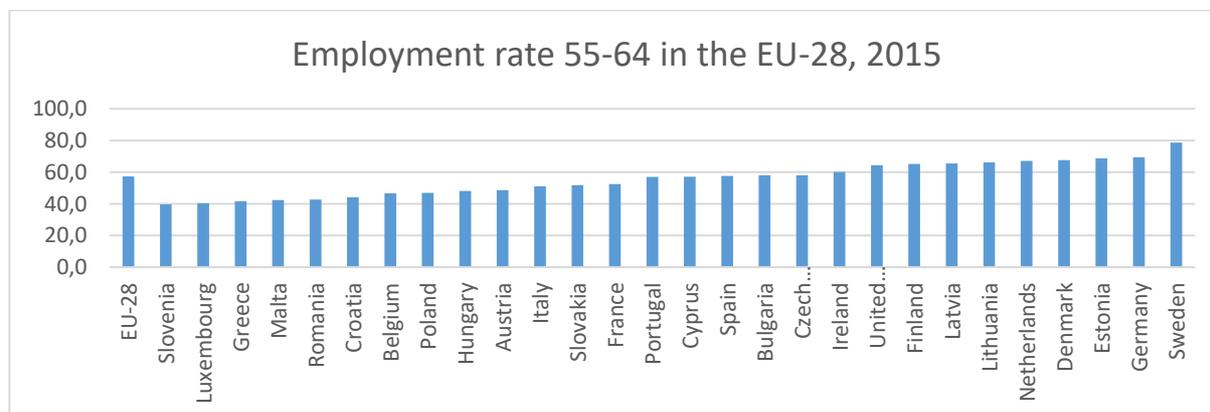
³ The unemployment rate is the number of unemployed people as a percentage of the labour force, where the latter consists of the unemployed plus those in paid or self-employment. Unemployed people are those who report that they are without work, that they are available for work, and that they have taken active steps to find work in the last four weeks.

⁴ Long-term unemployment refers to people who have been unemployed for 12 months or more. The long-term unemployment rate shows the proportion of the long-term unemployed among all unemployed.

⁵ Eurostat database

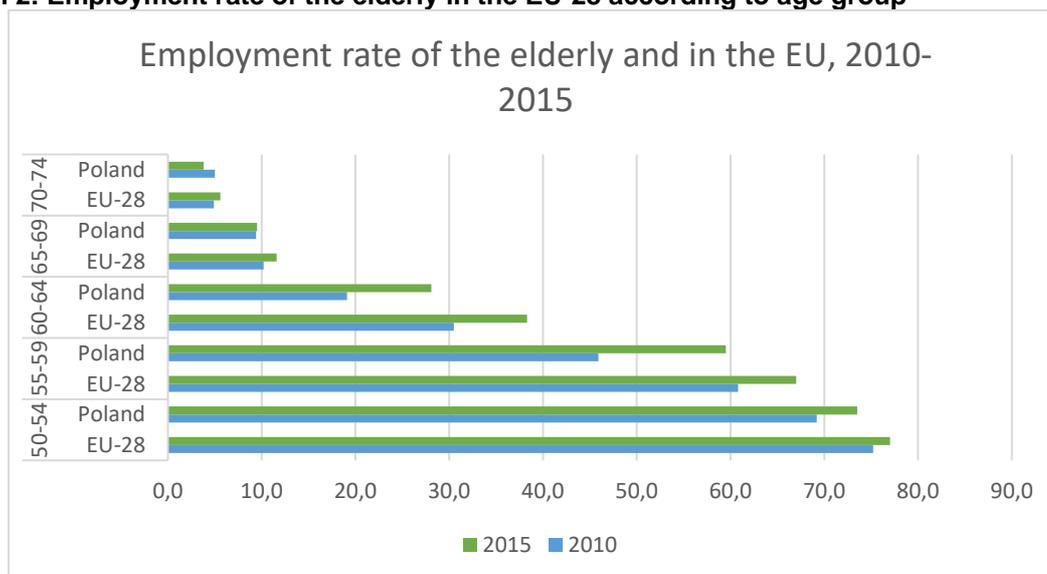
28 countries, as well as the average rate of the EU-28, and Graph 2 presents the elderly employment rates according to age group. Poland is among the countries with the lowest employment rate among the elderly. The older the age group, the lower the employment rate is.

Graph 1: Employment rates of the elderly in the EU-28, 2015



Source: own elaboration based on the Eurostat database

Graph 2: Employment rate of the elderly in the EU-28 according to age group



Source: own elaboration based on the Eurostat database

The graphs above show that Poland lags behind its EU neighbours in terms of employment rate, which has an influence on older people's workability. Thus, despite the progress made in recent years, greater policy efforts are required to stimulate the potential of active ageing in the country in order to reach the standards of Western Member States (Source: Izabela Styczynska, Country Report Task 4).

3. Extending Working Lives and Lifelong Learning: National Policies

3.1. Introduction

Classification as “Early” or “Late Movers”

When compared with other European countries, Poland belongs to the so-called “late movers” group in terms of willingness and ability to manage the older workforce both at the macro and the meso levels, and in terms of promoting age management policies and the employability and workability of older workers.

Predominant Concept of “Active Ageing”

The discussion of active ageing policies in employment in Poland started relatively late. During the transition from a centrally planned to a market economy at the beginning of 1990s, Poland had to rapidly develop democratic institutions and a free market economy, and the discussion of the issues related to an ageing society was postponed. Additionally, the second baby boomer generation—those born in the late 1970s and early 1980s—meant that the labour force in Poland was younger than in the majority of other European countries, obscuring the problems of an ageing population. The first discussions on this unfavourable situation emerged only in the second half of the 1990s, when the debate on pension system reform began. Longer activity and later retirement was then highlighted as a prerequisite for the financial stability of the social security system and adequate income at older ages, rather than as a way of achieving a self-fulfilling life. While few ageing policies were developed at the national level during that time, several interesting initiatives were undertaken at the regional level. In addition, the third sector for seniors, consisting of NGOs, has developed fairly rapidly over the last decade [6].

After EU accession, as a member of the EU, Poland was required to adjust its policies to the goals and priorities of the EU, which included active ageing. The first attempt in preventing the elderly from leaving the labour market early was the governmental programme called 50 Plus, established in 2003 by the Ministry of Labour and Social Policy [7]. Solidarity between Generations, which began in 2008 [1], was the first comprehensive and structured attempt to mobilise seniors’ potential in Poland. The detailed goals of the programme were focused on productive ageing, and particularly on increasing the number of years spent in productive employment. The Solidarity between Generations programme is the first and, thus far, the only programme which addresses the problems of the economic activation of people over 50 in a systemic and comprehensive way.

The intensive implementation of active ageing policies in Poland started in 2012, during the European Year of Active Ageing. The Ministry of Labour and Social Policy introduced a major programme, the Governmental Programme of Social Activity for the Elderly (ASOS) for 2012-2013 [2]. The main aim of the programme is to create the conditions for the elderly to stay active in societal and economic life longer. The programme has four priorities for the elderly: 1) education; 2) civic engagement promoting inter- and intra-generational activity; 3) social participation; and 4) social services. The implementation of the programme revealed significant needs at the individual level, which was expressed by the great number of applications. At the

same time, enormous deficiencies in local personnel and infrastructure for the elderly are still observed. Furthermore, several experts highlight that assistance should be more focused at the local level. Financial support has permitted the implementation of over 400 projects. Among them are several socially innovative ideas that aim to enhance the activity of the elderly in social life and in the labour market [2].

The second edition of the programme for 2014-2020 was implemented in 2013. It is large, comprehensive, and structured mid-term programme to mobilise seniors after Solidarity between Generations. The programme is being built on the experiences, deficiencies, and needs found in previous ad hoc activities. Furthermore, the Ministry of Labour and Social Policy has appointed two groups of stakeholders to be involved in the implementation of active ageing policies at all institutional and regional levels. The first is called Programme Council 50 Plus and is responsible for new solutions in the activation of the elderly in the labour market. The second, called the Advisory Council for Senior Policy, aims to prepare the mid-term conceptual framework for effective and structured senior policy in Poland. National representatives are also attempting to monitor efficient and innovative initiatives that would help them reach elderly activation faster and at a lower cost. In order to do so, they are creating measures of good practices and social innovations, which might serve other stakeholders in the future.

At the same time, other mid-term strategies indirectly related to the active ageing of the elderly are also being discussed (see for example, The Strategy of Human Capital Development 2020 [8]) (Source: Izabela Styczynska, 2013).

Predominant Concept of “Social Innovation”

In Poland, until 2013 social innovation concept was not defined in any national and/or regional document, although the concept was never completely new. Interviews performed in 2013 with representatives of the Ministry of Labour and Social Policy have confirmed that the concept of social innovation is of particular importance in recent discussions of active ageing policy reform in Poland. At that time, the majority of initiatives were undertaken ad hoc (Source: Izabela Styczynska, 2013)..

With the new wave of EU funds, where huge part of the funds are devoted to implementation of social innovative solutions, the concept has been well structured, defined and included in several national activities and programmes. According to the “Social Innovation Programme” financed from national sources, social innovation is defined as an innovative solution that address social needs of the population and result in a permanent changes within the social group, where the solution was introduced⁶. In addition to national funds, also one of the Operational Programmes of EU2014-2020 financing are devoted to this type of activities⁷.

⁶ „Social Innovation Programme”, NCBIR

http://www.ncbr.gov.pl/gfx/ncbir/userfiles/_public/programy_krajowe/innowacje_spoleczne/opis_programu_is_1.pdf

⁷ Operational Program – Knowledge, Education, Development (PO WER)

3.2 General Programmes and Outcomes

The Solidarity between Generations programme attempted to raise the employment rate of older workers based on the insight that early retirement increases social spending and, therefore, necessitates higher taxes and contributions with negative effects on the employment of younger cohorts (Styczynska, 2013).

The programme, initially adopted in 2008 and renewed in 2013, contains several measures with the aim of improving the labour force participation of those over 50 and the entrepreneurship of those over 45, and the aim of postponing the effective retirement age (Urbania/Wiktorowicz, 2014, based on the National Reform Programme 2020). As Styczynska (2013) remarks, “the intensive implementation of the active ageing policies in Poland started in 2012, during the European Year of Active Ageing”. As can be seen below, Poland’s political measures to extend working lives started late, but wholeheartedly. EU membership has been an important incentive to change (Ruzik-Sierdzińska et al., 2013).

The measures of the Solidarity between Generations programme aimed at increasing the economic activity of people over 50 and incorporated various sub-goals, such as: the improvement and adjustment of working conditions; age management knowledge dissemination among employees and employers; and the promotion of age management in companies, showing the advantages of older workers, skills upgrading, and the reduction of labour costs of the employment of those over 50.

In 2011, the Ministry of Labour and Social Policy published a report on the programme years 2008-2010. The employment rate of those aged 55-64 increased by 3.5 percentage points for women and 1.3 percentage points for men (Ruzik-Sierdzińska et al., 2013). Ruzik-Sierdzińska et al. (2013) state that an assessment of the mainly legislative measures is difficult because of the short period and the parallel economic downturn. Referring to Fandrejewska (2011) they state that there has been criticism concerning the cost/benefit ratio. Further, Ruzik-Sierdzińska et al. (2013) state that due to the origin of the Solidarity between Generations programme (fulfilling external requirements instead of the willingness to solve internal problems), the programme has created more of a facade than a real foundation for the initiatives.

In 2014, the Programme Council 50 Plus at the Ministry of Labour and Social Policy adopted the catalogue of recommendations aimed at complementing the Solidarity between Generations programme from 2013. The recommendations were divided into several program objectives: 1) adapting the skills and improving the qualifications of people over 45 from the perspective of the needs of the labour market; 2) developing a less hostile corporate culture and work environment for employees over 50; 3) increasing the efficiency and effectiveness of activities aimed at promoting employment and professional activity; 4) supporting the idea of active and healthy ageing; 5) developing cooperation aimed at improving the participation of people over 50 in the labour market; and 6) social transfers supporting the professional activity of people approaching retirement age.

Moreover, the recommendations also include proposals for measures relating to the horizontal objectives of increasing the professional activity of people with disabilities. In addition, the catalogue also specifies indicators for monitoring the implementation of measures, which, if implemented, can be used to evaluate the effectiveness of such measures (Programme Council 50 Plus recommendations on increasing the labour market participation of elderly people,

2014).

Evaluation of the Solidarity between Generations Programme

Participants of the Diagnosis 50 Plus study evaluated the programme. They found out that there is a general lack of knowledge of the programme and its elements, not only by workers aged 45, 50, or older, but also by other stakeholders, except employees of private job centres and employers (Urbaniak/Wiktorowicz, 2014). Another finding is that the protection of people over a certain age brought along dismissals of those who are close to the protected age. Further, employers consider the programme elements that reduce costs most beneficial to the employment of older workers (Urbaniak/Wiktorowicz, 2014). The authors refer to Krynska and Szukalski and suggest that Poland should adopt solutions found in Central and Eastern European (CEE) countries with an institutional background similar to that of Poland. One thing they consider worth emulating is the Czech job clubs for older workers and older unemployed people (Urbaniak/Wiktorowicz, 2014).

Sarzalska (2014) states “early retirement possibilities [have been] largely limited in last years”. The following pages will show that a lot has been accomplished, but employment figures show that there is still more to be done. (Source: National Policy Report, Naegele and Bauknecht).

The programme Solidarity between Generations has the objective of establishing the tools to contribute to reaching the goal of 50% employment among older people by 2020. This goal is realised through addressing both the demand and supply sides. From the demand side, Solidarity between Generations implements solutions for people over 50 years old to encourage them to remain in employment for as long as possible and to develop skills and competencies that are indispensable in the labour market through training and LLL activities. From the supply side, the programme creates initiatives encouraging employers to recruit and hire older people through reducing labour costs and awareness campaigns.

The programme acts on age discrimination, on support to older people with health limitations and disabilities, on the improvement of working conditions, on healthy ageing, and on gender equality, as well as organises professional training programmes.⁸ The programme started with the implementation of legislative changes in the area of labour law. It thus established a limitation on “bridging pensions”, reduced the number of granted paid sick days, promoted age-management among companies, and opened childcare facilities enabling mature women taking care of their grandchildren to have a professional activity.⁹ Between 2008 and 2010, the positive effects of the programme’s implementation could be observe, notably regarding the increase of skills through training, financial help offered to farmers, and regarding the figures of the elderly employment rate (+1.3% for men, +3.5% for women).¹⁰

The long-term effects of the programme are difficult to assess because the last evaluation to-date is that which was conducted in June 2010 and includes an analysis of the achievements made by the programme in two years time. However, the short-term success of the programme lies in the fact that the latter has been implemented at the regional and local level, because local institutions are closer to people than policies implemented for the whole country at the national level and are more likely to identify the drivers and barriers to the implementation of

⁸ <https://www.premier.gov.pl/wydarzenia/decyzje-rzadu/program-solidarnosc-pokolen-dzialania-dla-zwiekszenia-aktywnosci-zawodowej.html>

⁹ http://analizy.mpips.gov.pl/images/stories/publ_i_raporty/50+Solidarity_across_generations.pdf

¹⁰ http://www.mpips.gov.pl/gfx/mpips/userfiles/File/Analizy/Sprawozdanie%20_50_plus_01_2011.pdf

these policies. The evaluation of this programme can be found in the MOPACT report Conceptual Framework on the active ageing policies in Employment in Poland by Izabela Styczynska.¹¹

The ASOS programme 2014-2020 was introduced by the Polish Ministry of Labour and Social Policy as a continuation of the programme implemented for 2012-2013 and aims at boosting older people's social and professional activation and at moving the initiative of implementation of active ageing policies to the local level. The programme has four priorities: 1) the education of older citizens, including educational training, volunteering training, and the promotion of life-long learning among older people through the Universities of the Third Age; 2) social participation promoting integration within senior generations and between younger and older generations, including social activities such as volunteering, the promotion of physical activities, tourism and recreation, encouraging cultural activities, building social networks, and preventing social exclusion; 3) the social participation of older citizens, including activities for senior citizens in their local communities, participation in social/public life, and building a positive image of ageing; and 4) social services for senior citizens, such as the training of volunteers, support for self-help, increasing access to social services in various areas such as culture, education, sport, and tourism.¹²

The creation of these four categories was preceded by public consultations, where associations of elderly, non-profit organisations, and other relevant stakeholders were introduced to take part in the dialogue. Based on their requests, and their identification and assessment of the problems existing in the regions, the programme was created and implemented at the national level.

In 2014, an updated version of the programme was implemented and budget limitations intervened within each of the four categories. Thus, priority 1 saw 30% of its budget cut, priority 2 experienced a 40% budget cut, and priorities 3 and 4 faced 15% budget cuts. This updated version also implemented a long-term senior policy approach in Poland for years 2014-2020, which tackles the main issues related to the population's ageing and active ageing: the adaptation of skills and qualifications of older people to labour market needs; developing a softer and less hostile corporate culture and working environment for people over 50; supporting activities stimulating professional activity among older people; and encouraging the concept of active and healthy ageing. These measures aim at using the potential of people aged 50+ on the labour market at the maximum in order to enable them to be financially and physically independent for the longest time possible¹³ (Source: Izabela Styczynska, 2013).

3.3 Public Pension and Retirement Policies

For most elderly Poles, the statutory retirement age is the time when they retire. This age has been raised from 60 for women and 65 for men to 67 for both (in 2020 for men and 2040 for women) (Urbaniak/Wiktorowicz, 2014, see also Styczyńska, 2013 and Żołniercz-Zreda, 2015a). Two years after the implementation of the reform, the new government withdrew from it, and introduced a new reform at the end of 2016, where the retirement ages were reinstated. From October 2017 the statutory retirement age is 60 for women, and 65 for men.

¹¹ <http://www.case-research.eu/sites/default/files/publications/S%26A%20470.pdf>

¹² <https://www.mpips.gov.pl/seniorzyaktywne-starzenie/rzadowy-program-asos/>

Further, incentives to work longer became independent of wage level. In the past, incentives were lower for low earners due to a (redistributive) flat-rate component of about 24% of the average wage. The new pension calculation is based mainly on individual contributions, with only weak exceptions, such as the minimum pension guarantee and pension entitlements for special life phases such as maternity, among others (Chlon-Dominczak, 2009).

Early Retirement

Though in 1998, the possibility for early retirement after being laid off was abolished, new pathways were established, such as pre-retirement benefits for laid-off workers above a certain age (50 for women and 55 for men, and sometimes below). Later, eligibility criteria were tightened. Now pre-retirement benefits are paid to laid-off workers who cannot find new employment over 60 and 55 for men and women, respectively, (Chlon-Dominczak, 2009), and suggest that due to substitution effects, various early exit pathways should be closed (Chlon-Dominczak, 2009). Chlon-Dominczak (2009) states that Polish evidence shows a clear link between early retirement options and the labour market participation of older workers. Effects from early retirement options on the labour market participation of older workers can be stronger than the effects resulting from workers' incentives alone, as these incentives encourage older workers to leave the labour market, which burdens public budgets, raises labour costs, and reduces labour demand, especially for those considered less productive, such as older workers (Chlon-Dominczak, 2009).

Zientara (2008) states that the average retirement age in Poland is extraordinarily low and explains this with advantageous early retirement regulations for some professional groups inherited from the communist era, such as policemen, teachers, railwaymen, and miners (miners also in Germany), and in some special health-impairing sectors such as steel production, energy production, and construction. In some cases, workers can retire at age 40 (females) or 45 (males). Similarly, Chlon-Dominczak (2009) explains a recent (before 2009) drop in the average retirement age by more and more teachers retiring early. Teachers can retire after 25 or 30 years in service irrespective of their age, and early retirement by miners explains why a fifth of retiring men do so before they are 50 (Chlon-Dominczak, 2009).

While early retirement pensions can be very low (D'Addio et al. (2010) state that Poland is one of the countries with the highest increase in pension wealth for working additional years), special pension systems for some occupations can lead to pension benefits at about 60% of the average salary, which is a disincentive since work does not pay. The rather high limits to additional earnings for early retirees (Zientara, 2008) are, on the one hand, a financial problem as they contribute to the attractiveness of early retirement schemes. On the other hand, this could have positive effects on labour supply. Yet, because those who lose their job are incentivised to enter early retirement by comparably generous benefits and high limits on additional earnings (Zientara, 2008), labour supply could be diminished by early retirement pathways.

In order to limit early labour market withdrawal, the Solidarity between Generations programme limited entitlements to "bridging pensions" (Urbaniak/Wiktorowicz, 2014). Coming into effect in 2009, these bridging pensions were a "temporary solution replacing early retirement" (Ruzik-Sierdzińska et al., 2013). The bridging pensions were available to men (60+) and women (55+) "working under special conditions or performing work of a special character and who were included on an official government list of types of professions prepared by occupational health

specialists" (Ruzik-Sierdzińska et al., 2013). While this group included 270,000 workers, about 900,000 people lost their right to early retirement due to the abolishment of the early retirement programme (Ruzik-Sierdzińska et al., 2013).

3.4 Partial Retirement / Partial Pension Policies

Given that older workers are in favour of part-time jobs (also due to early retirement schemes allowing high incomes from work, see below), Zientara (2008) proposes some labour-code reforms that allow for more flexibility.

In order to raise the employment of those above the legal retirement age, the Solidarity between Generations programme abolished limits on additional earnings for this group. At the same time, the possibilities to combine income from work and pensions for those below the legal retirement age have been defined (Urbaniak/Wiktorowicz, 2014). As Styczynska (2013) writes, the preconditions for the parallel receipt of pension benefits and wage income are (a) being above the legal retirement age and (b) the termination of employment at the previous employer, whereas re-hiring at this employer is possible.

3.5 Promoting Self-Employment

The Operational Programme for Human Capital Development addresses the issue of self-employment. Measures are offers of training and professional assistance and subsidies (Styczynska, 2013). The programme Active Women (Aktywna kobieta) was launched in 2007 and targets women 50+. Besides training offers (especially in occupations with labour market shortages), the programme promotes self-employment (Botti et al., 2011).

3.6 Unemployment Policies and Employment Protection

In contrast to neighbouring countries such as the Czech Republic and Hungary, Polish unemployment policies used to be passive (Brown, 2007). After EU accession, Polish labour market policies became far more active, also due to financial resources from the European structural funds (Sztandar-Sztanderska, 2009).

The 2004 Act on employment promotion and labour market institutions and further amendments contains various active labour market instruments financed by the Labour Fund. In addition, it has been defined that, among other subgroups, those unemployed below age 25 and over age 50, the long-term unemployed are "people in a special situation in the labour market" (Sztandar-Sztanderska, 2009). Sztandar-Sztanderska (2009) criticises that entry into active labour market programmes is complicated and to the disadvantage of those lacking the skills or the contacts to get sufficient information. Further, according to Sztandar-Sztanderska (2009), local civil officers divide their unemployed clients into a small group of active jobseekers and a larger group of inactive jobseekers. While members of the former group are cared for and analysed concerning experience, competencies, familial circumstance, and preferences in order to find a job for this person, the latter group is suspected of being not motivated to work or being occupied with illegal work. Yet, those under 25 and over 50 are legally entitled to get from the local labour office (LLO) a job offer or some activation measure in the first half year after registering as unemployed. Though, for these groups, the probability of getting special treatment in the form of being perceived as active and getting better help to find work or being labelled as unwilling to work and being punished (Sztandar-Sztanderska, 2009) is a

double-edged sword depending on individual circumstances, and both forms of special treatment should increase the likelihood of leaving unemployment.

Access to various forms of active labour market policies, such as “internships, on-the-job-training, and various forms of subsidised employment” (Sztandar-Sztanderska, 2009) is restricted to those “in a special situation in the labour market”, to which those over 50 belong. As Sztandar-Sztanderska (2009) notes, this targeting based on somewhat superficial criteria is criticised by local civil servants as it prevents them from including those who do not belong to these groups but are in a special situation nevertheless. Though those over 50 belong to an advantaged group, individual training is restricted to those whose participation “makes employment more probable”, meaning that they must have a signed declaration from the employer that they will be hired after training. Sztandar-Sztanderska (2009) states that this is another advantage for those who have better chances anyway. Another critique by Sztandar-Sztanderska (2009) is the prevalence of quantity over quality, leading to a prevalence of uncoordinated short-term and cheap programmes. This results from the motivation to receive all of the available financial means provided by the European Social Fund. Finally, Sztandar-Sztanderska (2009) criticises that the Polish activation model is very liberal in terms of its reliance on self-help and the emphasis put on disciplinary means. She (2009) suggests that firstly, LLOs should be empowered (more staff and more autonomy to define locally vulnerable groups and to allocate resources to quality instead of quantity). Secondly, effective local networks should be set up to improve coordination between public and private actors.

The duration of earnings-related unemployment benefits is between 6, 12, or 18 months and depends on the regional unemployment rate, the age of the unemployed, the length of previous work, and on family circumstances (the higher the level of regional unemployment, the later eligibility expires; Baum-Ceisig et al., 2008 also state that in 2004, only 15% of the unemployed received benefits; see also Sztandar-Sztanderska, 2009).

Standard flat-rate benefits are very low (in 2008, this was €132, which amounted to 49% of the minimum wage or 19% of the average wage, see also Sztandar-Sztanderska, 2009), so that there are no or negligible financial disincentive effects after the expiration of earnings-related benefits.

Although the Polish unemployed older than 45 lacked sought-after skills (Zientara, 2008 refers to the time around Polish EU accession), Zientara states that there is a second, CEE-specific reason for their high joblessness rate. Employers thought that these workers still adhered to “a socialist work ethos characterised by insufficient organisational commitment, feeble work involvement, shirking, or absenteeism” (Zientara, 2008; Żołniercz-Zreda, 2015a suggests that it should be researched how these stereotypes affect age discrimination at the workplace). Although this refers to the time around Polish EU accession, it is possible that employers at least partially still hold these views about workers not older than 55. In contrast to the views concerning people of a specific age, views concerning certain cohorts are merely of temporary relevance (if being 30 in 1989 or 45 in 2004 is the dividing line for having [sufficient] communist work experience or not, in 2029, the youngest of this group are 70 years of age), but, naturally, this takes place slowly. These disadvantages for older workers (lack of sought-after skills and negative employer views) were accompanied by a low motivation to find work.

Under the Solidarity between Generations programme, employers are motivated to employ those over 50 by the following measures: 1) they pay sick leave for only 14 instead of 33 days; 2) they do not have to pay contributions to the Labour Fund and Employee Benefits Guarantee

Fund for newly hired people; and 3) they can obtain co-financing for workplace equipment with the high limit of six times the average salary (Urbaniak/Wiktorowicz, 2014). To be implemented in 2014 was the co-financing (up to 30% of minimum pay) of the wages of newly hired former long-term unemployed if they are over 50 (Urbaniak/Wiktorowicz, 2014).

The priorities addressed by the Programme Council 50 Plus to increase the efficiency and effectiveness of activities aimed at promoting employment and professional activities include: diffusion within labour market institutions of professional activation instruments aimed at people over 50 and improving their effectiveness, the establishment of a comprehensive system for supporting the development of entrepreneurship among people over 50, and the implementation of systemic solutions aimed at encouraging people over 50 to remain in employment and to take up employment.

Since 2004, employers are no longer allowed to dismiss workers in the four years preceding the legal retirement age (Anxo et al., 2012).

There are legal regulations intended to protect those over 45 or 50 from job loss or to help them to find work in case of unemployment. A great debate is now taking place at the national level as to whether this protection is effective and brings the assumed results. It is observed that employers have dismissed workers just before they enter the protection period. Such an employee is in a very difficult position to find employment. They are the first to leave the job market and increase labour market inactivity in Poland.

Zientara (2008) argues that strict employment protection in Poland limits the growth of the service sector and, following from this, negatively affects the employment of older people, because those aged between 55 and 64 tend to prefer to work in services. Although Zientara (2008) states that the Polish service sector is underdeveloped in international comparison (about half of the working population does not work in the service sector), the combination of older workers' preference for the services sector and widespread black work (see below) suggests that the number and share of (older) workers in the services sector are higher than officially reported.

Relaxing employment protection is one of the key reform suggestions by Zientara (2008).

Within the Solidarity between Generations programme, the "protective measures" against dismissal in the last four years before retirement aim at fostering older workers' employment (Urbaniak/Wiktorowicz, 2014).

Part of the Solidarity between Generations programme (2008) are "exemptions from contributions to the Labour Fund and the Guaranteed Employee Benefits Fund for people in the pre-retirement age" (http://analizy.mpips.gov.pl/images/stories/publ_i_raporty/50+Solidarity_across_generations.pdf).

3.7 Health Protection and Promotion, Prevention of Disability

"Ill-health is the main reason for leaving the labour market early" (Żołniercz-Zreda, 2015a). SHARE (2014) data shows that the health of adult Poles is worse than the average health of adults in other European countries (Żołniercz-Zreda, 2015b). Other studies show that the health conditions of the 50+ group in Poland has improved (Żołniercz-Zreda, 2015b). According to one study by Górniak et al. (2013) (cited in Żołniercz-Zreda, 2015b), bad health is the major barrier to paid work for one third of the unemployed 50+. Accordingly, health problems are also a cause of unemployment.

Among 17 European countries in 2011, Poland ranked second (first: Hungary) when it comes to the percentage of 50-64 year olds with “one or more mobility, arm function, and fine motor limitations” and “two or more chronic diseases” (Sonnet, 2014, based on OECD estimates using SHARE data). Possibly, this was also due to the coexistence of reforms closing early exit routes and the (still) low employment rates of older workers. Sarzalska (2014) suggests that poor health conditions have to be addressed.

The number of sick days for which wages must be paid by the employer has been reduced. Solidarity between Generations incorporated the concept of healthy ageing for the first time, including:

- Preventive measures to counteract the reduction of productive abilities;
- Screening interventions for those 50+;
- An identification system of health treatments;
- Monitoring of the risk of becoming unable to work for those 50+, plus the early implementation of rehabilitative programmes; and
- Promotion of employees' access to private health care insurance services (Styczynska, 2013).

The Programme Council 50 Plus recommends several priorities in supporting the idea of active and healthy ageing, including:

- Popularising the idea of active and healthy ageing, including the benefits of active ageing, and promoting active ageing in society;
- Supporting a number of forms of activity at non-professional levels (including educational activity in the areas of culture, social activity, and volunteering; physical activity; health-enhancing activity; and civic activity at the local level);
- Promoting regular third pillar savings during the entire period of professional activity as a measure that, on the one hand, helps increase the amount of income in retirement and on the other, encourages people to work longer and raises people's awareness about the need to plan for the future and make provisions for old age;
- Promoting and popularising a healthy lifestyle and preventive healthcare;
- Developing new forms and measures that are intended to encourage and motivate people of different ages, including people over 50, to engage in physical activity and that facilitate such activity;
- Developing solutions providing a basis for cooperation and coordination of activities at the regional and local level;
- Developing cooperation between employers and trade unions in the area of preventive healthcare;
- Establishing a coordinated system of providing information on the health condition of patients/employees and the self-employed to identify potential health risks and improve the implementation of preventive and rehabilitation measures;
- Implementing comprehensive solutions related to the promotion and development of preventive healthcare programmes, like “Health check” for people aged 50+; and

- Implementing measures at the local government level, including, but not limited to, measures aimed at labour market policy that will take into account the health of the unemployed as a barrier to their employment and will intervene.

Among the several measures of the Solidarity between Generations programme are increased efforts to activate the disabled, for example, through legal frameworks for occupational rehabilitation and awareness campaigns for employers about the advantages of employing disabled workers. For example, procedures and rules for hiring disabled people are simplified, financial incentives to stay economically passive are lowered for older disabled persons, and more older disabled people are to be employed in the public sector, also in order to provide a role model for the private sector (Styczynska, 2013).

3.8 Work-Life Balance Policies

The Solidarity between Generations programme aims at longer working lives for those over 50 and also contains opportunities for women to combine work and family, for example, with simpler rules for the opening of new kindergartens and support of a kindergarten net, especially in rural areas (financed also by the European Social Fund), and the possibility for companies to finance company kindergartens from the company's social benefit fund. It is not clear here if the reasoning behind is (a) to enable grandmothers to work instead of looking after their grandchildren or (b) to keep young women in the labour force, as young women dropping out of the labour force reduce the labour force participation of older women when the cohort ages. Nevertheless, such activities should foster the employment rate of older women, either now or later.

A focus on family obligations is sensible, as research shows that this is one of the main factors of unemployment (besides poor health, lack of skills, and lack of available jobs, see Żołniercz-Zreda, 2015a). This is also one explanation for the low employment rate of older female workers (Żołniercz-Zreda, 2015a).

3.9 Anti-Discrimination Legislation

Solidarity between Generations tried to alleviate negative age stereotypes by (a) highlighting the advantages of older workers; (b) spreading age management knowledge; (c) showing that age management is not costly; and (d) the implementation of age management in companies (Styczynska, 2013). The programme is supplemented by the recommendations prepared by the Programme Council 50 Plus on the development of a less hostile corporate culture and work environment for employees over 50. The recommendations include: development career planning systems, skills acquisition and age management in enterprises to benefit from the potential of employees over 50 (such as the development of the notion of age management, financial support, and advisory and consultancy support for employers implementing or improving long-term age management solutions); improvement of working conditions and increasing the motivation and job satisfaction of employees over 50 (through adapting working conditions to the capabilities, limitations, and requirements of employees over 50 and solutions aimed at supporting employees in maintaining good health and physical condition); implementation of systemic solutions aimed at encouraging employers to employ and maintain the employment of people over 50 (through legislative solutions, the promotion of existing solutions, or the development and monitoring of changes in corporate culture of 50+ friendly companies

and institutions); and improvement of the image of employees over 50 and breaking stereotypes about employees over 50 as well as counteracting age discrimination in companies and institutions.

3.10 Other Policy Approaches

Informal Work

In Poland, many retirees work in the black economy. As Zientara (2008) notes, this is advantageous for the worker (higher take-home pay and no suspension of pension benefits above a certain income) and the employer (labour code regulations do not apply; for example, firing is easy when labour demand vanishes). As noted earlier, local civil officers responsible for finding employment for the unemployed suspect many of their clients add black work income to their unemployment benefits (Sztandar-Sztanderska, 2009).

Though, as stated, many retirees work in the black economy, black labour is prevalent to similar degrees in all age groups; hence, combating black labour, especially among the old, has not been priority (Styczynska, 2013).

Further Reform Suggestions

Zientara (2008) suggests making social security contributions dependent on regional productivity and costs of living so that those less productive (aged 55+) are not priced out of employment (Source: National Policy Report, Naegele and Bauknecht, 2015).

4. Extending Working Lives and Lifelong Learning: Good Practices

Measures and approaches aimed at supporting the professional activation of people aged 50+ have several addressees. Almost half are addressed to public institutions and regional governments. The rest are directed to individuals and to employers.

All activities can be divided into five objectives:

- Improving the qualifications and skills of people aged 45+ in accordance with labour market needs;
- Creating less hostile corporate cultures and work environments for older employees;
- Increasing the efficiency of activities aimed at promoting employment and professional activity;
- Supporting the idea of active and healthy ageing; and
- Developing cooperation aimed at improving the participation of people over 50.

The first objective includes activities related to the training and education of the elderly. It supports LLL activities (promotion, educational counselling, between-generational cooperation, and provision of trainings). One activity of an innovative character is the support of the sustainable cooperation of employers with educational institutions in shaping the educational and development offer for people over 45. The second interesting activity under this objective supports an increase in the awareness and attractiveness of the employment of the elderly among SMEs. Measures under this objective are addressed to employed and unemployed people aged 45+ and to employers.

The second objective includes activities enforcing the development of systems of career planning in companies, improvement of working conditions, and the implementation of systemic solutions aimed at encouraging employers to retain employees aged 50+. These activities are mainly addressed to employers.

The objective focused on healthy and active ageing (objective 4) has a very broad scope and is addressed not only to the elderly, but also to the entire public. Activities implemented under this topic are related to economic activity as well as to other broad forms of social, cultural, and educational activities.

The third and fifth objectives are mainly addressed to public institutions and regional authorities. They aim to increase the promotion of elderly employment and to build cooperation between public institutions and social partners. These objectives are excluded from our analyses.

Many of the measures described above reflect the possibility to introduce foreign good practices into the field of mobilising older workers in Poland both on the demand and supply sides. Special attention is given to the disabled as a part of the target group that has specific needs for better engagement in the labour market. However, other horizontal dimensions, like gender equality, are often missing.

The approach presented is evolving over time. Despite the fact that no evaluations have been implemented, public authorities analyse the demand and the needs of public institutions, regional governments, and institutions of third sector, and adapt approaches according to their requests. Public debates initiated by Polish Ministry of Labour and Social Policy, especially in

the field of extending the working lives of the elderly, are broadly used and commonly accepted by all social partners. Therefore, topics neglected in the past are now being discussed and implemented.

Money is an important topic in implementing programmes. This overview has shown that the majority of these approaches use funding from the European Social Fund, while some are financed by the Regional Operational Programme. In addition, national funds from the Polish Ministry of Labour and Social Policy are available (for example, the ASOS programme).

In summary, the concept of active ageing was developed relatively late in Poland, and the majority of actions were initiated at the local level by the third sector or by local governments. Nevertheless, public authorities have easily managed to create national programmes of a coherent character with common aims and indicators.

4.1 Good Practices on the Supply Side of Labour

Good Practice 1

Fair recruitment policy and cooperation after retirement

1. Actor

Filter Service Sp. z o.o. in Zgierz. The company conducts laboratory research and produces filtration materials and personal respiratory protection devices. More than 41% of the staff are aged 46 years or older, some of whom have disabilities.

State of the art:

Ongoing

Public incentives used:

Yes, tax privileges and exemptions from paying certain administrative charges, among others

In practice/idea/proposal:

In practice

2. Reasons

Since the mid-1990s, the company has been looking for solutions to the social problems faced by disabled people. The company started to maintain a fixed percentage of disabled people in its workforce. It also recruited many mature workers that probably would not be able to find employment elsewhere due to their age. The company employs some of its former employees during their retirement as well.

3. Description of approach

The age of the employee is not a selection criterion during the recruitment process at Filter Service. The company seeks qualified and able employees who can participate in the development of high quality products. The employees are provided with periodic training that allows them to enhance their skills. The company tries to employ families in order to create a friendly atmosphere. They also employ disabled persons and former employees on a part-time basis.

Is the approach targeted especially at older workers or at all groups?

The approach is targeted at all workers.

3.1 Dimensions and quality of work (career and employment security and wages, among others)

Employment security and part-time jobs

3.2 Values / motivation

Qualifications, friendly atmosphere, and solving social problems

3.3 Professional competence (LLL)

Periodic professional trainings for employees

3.4 Health

Guaranteed professional healthcare and rehabilitation if necessary.

3.5 Close social network

Employees of the company constitute a close social network

3.6 Family and work-life balance

Entire families can work together

4. Work after retirement

After some time of rest, former employees may return to the company to work on a part-time basis.

5. Life course orientation

N/A

6. Overarching dimensions of MOPACT touched (gender, older migrants, intergenerational solidarity, disabled workers, social inequality, or regional dimensions, among others)?

Intergenerational solidarity, disabled workers, and regional dimensions

7. Linkage to informal work/civic engagement/social volunteering?

N/A

8. Other socially innovative dimensions touched worth mentioning?

N/A

9. Brief SWOT evaluation including transferability, sustainability, and usability:

Strengths:

No age discrimination during recruitment

Helping disabled workers

Friendly atmosphere at work

Weaknesses:

It is not always good to work with family members

Company might face financial difficulties in satisfying all employees' health needs

Opportunities:

Possibility to implement in other companies

New generations may follow the previous and join the company

Threats:

Next generations of employees might not be as reliable as the previous

10. Further relevant information

<http://www.filter.zgierz.pl/eng/><http://www.filter.zgierz.pl/eng/>

<http://www.zysk50plus.pl/?module=Companies&action=GetCompany&companyId=161§ionId=6>

Good Practice 2

Expert Vattenfall

1. Actor

Vattenfall Energy Trading Sp. z o.o. in Warsaw. The company is a part of the European concern Vattenfall, which is active in the generation, distribution, and sales of electricity and heat, as well as the sales of gas. It is the largest producer of heat and energy in cogeneration in Poland.

State of the art:

Ongoing

Public incentives used:

No

In practice/idea/proposal:

In practice

2. Reasons

Until 2017, more than half of the employees of Vattenfall in Poland will acquire pension benefits and the majority of these employees will retire. Thus, the company will lose its most important asset—experienced professionals. To address this issue, Vattenfall organises workshops and coaching activities for older employees to teach them how effectively transfer their knowledge to younger colleagues.

3. Description of approach

The programme is based on a series of workshops for older employees in which they are taught about knowledge management, experience exchange, creativity, communication, and self-presentation. The mature employees are trained to prepare the next generation of workers for their jobs. They also participate in events at schools and universities and promote employment in the energy sector.

Is the approach targeted especially at older workers or at all groups?

The approach is targeted at older workers.

3.1 Dimensions and quality of work

Employment security, good remuneration, and professional development possibilities

3.2 Values / motivation

Expertise and knowledge transfer

3.3 Professional competence (LLL)

Professional training in knowledge management

3.4 Health

N/A

3.5 Close social network

N/A

3.6 Family and work-life balance

N/A

4. Work after retirement

N/A

5.	Life course orientation
	N/A
6.	Overarching dimensions of MOPACT touched (gender, older migrants, intergenerational solidarity, disabled workers, social inequality, or regional dimensions, among others)?
	N/A
7.	Linkage to informal work/civic engagement/ social volunteering?
	N/A
8.	Other socially innovative dimensions touched worth mentioning?
	N/A
9.	Brief SWOT evaluation including transferability, sustainability, and usability:
	Strengths:
	Facilitating knowledge transfer in firm
	Development of older employees
	Weaknesses:
	Workshops and coaching might be costly
	Older employees might be reluctant to use modern methods of knowledge management
	Opportunities:
	Easily transferable into other organisations
	Threats:
	N/A
10.	Further relevant information
	http://www.zysk50plus.pl/storage/fck/file/vattenfall_dobra_praktyka.pdf http://www.zysk50plus.pl/storage/fck/file/vattenfall_dobra_praktyka.pdf
	http://www.zysk50plus.pl/storage/fck/file/vattenfall_dobra_praktyka.pdf

Good Practice 3**Employment policy—more than half of employees aged 50 or older****1. Actor**

Zemat Sp. z o.o. in Łódź. Polish-American corporation and a primary European manufacturer and supplier of technologically advanced machines using High Frequency (Radio Frequency) Technology for plastics welding and sealing.

State of the art:

Ongoing

Public incentives used:

No

In practice/idea/proposal:

In practice

2. Reasons

The company delivers individualised solutions for clients of specific needs. Hence, the firm requires highly qualified and experienced employees. This expertise can only be provided by long-term workers. They are a key resource of the firm and guarantee the reliability and quality of its products.

3. Description of approach

Long-term workers constitute the main part of the Zemat workforce. Most are aged 50 or older. The company is determined to retain its employees as it faces difficulty recruiting new suitably qualified workers. The company attempts to retain its older employees by offering flexible employment options (depending on the amount of orders), flexible working hours, financial benefits, and management meetings with staff.

Is the approach targeted especially at older workers or at all groups?

The approach is targeted especially at older workers.

3.1 Dimensions and quality of work (career and employment security and wages, among others)

Employment security, financial benefits, and flexible working hours

3.2 Values / motivation

Respect for older employees, appreciation for the knowledge, skills, and experience

3.3 Professional competence (LLL)

Older employees serve as mentors, tutors, and teachers for the younger staff

3.4 Health

N/A

3.5 Close social network

The employees usually work in units and teams that constitute a close social network

3.6 Family and work-life balance

Flexible working hours, work on a part-time basis

<p>4. Work after retirement Possible, usually when there is a need for the company (depending on the amount of orders)</p>
<p>5. Life course orientation N/A</p>
<p>6. Overarching dimensions of MOPACT touched (gender, older migrants, intergenerational solidarity, disabled workers, social inequality, or regional dimensions, among others)? Employment policy at Zemat gives the opportunity for intergenerational cooperation when older employees transfer their knowledge and skills to younger employees.</p>
<p>7. Linkage to informal work/civic engagement/ social volunteering? N/A</p>
<p>8. Other socially innovative dimensions touched worth mentioning? N/A</p>
<p>9. Brief SWOT evaluation including transferability, sustainability, and usability</p> <p>Strengths: The policy allows the company to maintain high quality and reliability The initiative helps to make the most of the skills and knowledge of older workers</p> <p>Weaknesses: There might not be enough young workers to perform simpler tasks due to the company's policy</p> <p>Opportunities: Stable employment in Zemat may encourage young people to study in vocational schools</p> <p>Threats: If there will be no inflow of new younger workers, someday the company may collapse</p>
<p>10. Further relevant information http://www.zemat.com/pl/ http://www.zysk50plus.pl/?module=Companies&action=GetCompany&companyId=171&sectionId=6 http://www.kadry.abc.com.pl/czytaj/-/artykul/zarzadzanie-wiekciem-dobre-praktyki-polskich-organizacji</p>

Good Practice 4

Mentoring through IT

1. Actor

Krajowa Agencja Informacyjna "Info" Sp. z o.o. with Fundacja na Rzecz Rozwoju Społeczeństwa Opartego na Wiedzy "Nowe Media", Warmińsko-Mazurski Związek Pracodawców Prywatnych, and Zakład Elektronicznej Techniki Obliczeniowej w Olsztynie Sp. z o.o.

(eng. National Information Agency with the Foundation of the LLL Society, Regional Association of Private Employers, and the Electronic Institute of Computing Technology)

State of the art:

The project was held during 2006-2007

Public incentives used:

Yes, financed by the EQUAL Community Initiative Programme

In practice/idea/proposal:

In practice

2. Reasons

The project was developed to meet the needs of the older experienced employees that face difficulties in managing modern IT solutions, and the young people attempting to enter the job market who lack relevant expertise. To address these issues, the programme was designed to match the needs of both groups as they might be satisfied by the other.

3. Description of approach

Before the programme was launched, there was a comprehensive study to recognise training needs of the two groups of people—experienced professionals with little computer skills and young people finishing their education. After the identification of complementary needs, the groups were matched. First, the younger generation helped the older generation in using an e-learning platform. Next, the platform was used to transfer knowledge from the older workers to their younger colleagues.

Is the approach targeted especially at older workers or at all groups?

The approach was targeted at people aged 50 or older from the SME sector and people entering the job market.

3.1 Dimensions and quality of work (career and employment security and wages, among others)

N/A

3.2 Values / motivation

Expertise and intergenerational cooperation

3.3 Professional competence (LLL)

Improving IT competences of older workers

3.4 Health

N/A

3.5 Close social network

Mentoring relationship

N/A	3.6 Family and work-life balance
N/A	4. Work after retirement
N/A	5. Life course orientation
	6. Overarching dimensions of MOPACT touched (gender, older migrants, intergenerational solidarity, disabled workers, social inequality, or regional dimensions, among others)? Intergenerational solidarity—younger people and older people help each other
N/A	7. Linkage to informal work/civic engagement/ social volunteering?
N/A	8. Other socially innovative dimensions touched worth mentioning?
	9. Brief SWOT evaluation including transferability, sustainability, and usability: Strengths: Project was based on a comprehensive research of the needs Skills and knowledge that were transferred via mentoring were company-specific Various participants—firms from different sectors, schools, NGOs Weaknesses: Older workers were reluctant to share their knowledge Additional knowledge management training was needed Opportunities: The project can be applied in any sector anywhere Threats: N/A
	10. Further relevant information http://www.equal.org.pl/baza.php?M=10&PID=53&lang=pl

Good Practice 5

“I’m coming back to work”. Computer skills as a chance to return to professional activity.

Theme: IT training to facilitate a return to the job market

1. Actor

Office MK Informatyczne Centrum Szkoleniowe in Słupsk. The organisation is a private centre of LLL and professional training.

State of the art:

The initiative took place between April 2008 and December 2009.

Public incentives used:

Yes, funds from Human Capital Operational Programme

In practice/idea/proposal:

In practice

2. Reasons

Older people often face difficulties working on the computer. The lack of ICT skills is frequently a reason why these people are unemployed. To overcome this problem, Office MK organised a series of trainings for older unemployed people in which they could learn the necessary computer skills.

3. Description of approach

Before the programme was launched, there was a survey analysing the job market in the area and identifying the needs of the older unemployed. Next, there was an information campaign about the initiative in the press and an awareness campaign using posters and flyers. Finally, the professional training in ICT skills took place. The participants learned how to use a computer and office equipment and how to surf the Internet.

Is the approach targeted especially at older workers or at all groups?

The approach is targeted especially at older workers.

3.1 Dimensions and quality of work (career and employment security and wages, among others)

Better career opportunities after achieving computer literacy

3.2 Values / motivation

Support for unemployed people

3.3 Professional competence (LLL)

Development of ICT skills

3.4 Health

N/A

3.5 Close social network

N/A

3.6 Family and work-life balance

N/A

4. Work after retirement

Some of the participants were retired. However, after the ICT training, some may return to the job market.

5. Life course orientation

N/A

6. Overarching dimensions of MOPACT touched (gender, older migrants, intergenerational solidarity, disabled workers, social inequality, or regional dimensions, among others)?

Combating unemployment and digital exclusion

7. Linkage to informal work/civic engagement/ social volunteering?

N/A

8. Other socially innovative dimensions touched worth mentioning?**9. Brief SWOT evaluation including transferability, sustainability, and usability:****Strengths:**

Improving ICT skills in society

Combating unemployment

Low cost

Weaknesses:

Small scale

Not enough time to practice for people not having a computer at home

Opportunities:

Training can be organised anywhere

The programme can develop further as there is a significant need for ICT skills nowadays

Threats:

After the training, the participants might not follow changes in technology and, as a result, become digitally excluded again

10. Further relevant information

http://mp-defs.pomorskie.eu/projekt/id,101,wracam_do_pracy_-umiejetnosc_obsługi_komputera_szansa_na_powrot_do_aktywnosci_zawodowej.html

Good Practice 6

Government Programme for Social Activity of Older People (ASOS) for the years 2014-2020 (Rządowy Programme na rzecz Aktywności Społecznej Osób Starszych na lata 2014-2020)

1. Actor

The Polish Ministry of Labour and Social Policy in cooperation with NGOs, non-profit organisations, and local government units.

State of the art:

Ongoing since 2014. The programme is a successor to the Government ASOS Programme for the years 2012-2013.

Public incentives used:

Yes

In practice/idea/proposal:

In practice

2. Reasons

Poland has the lowest ranking on Active Ageing Index in the EU. Social activity, including employment, is very low among older people. The programme aims at increasing the social productivity of this group and, subsequently, increasing their standard of living.

3. Description of approach

The approach of the programme is, among others, designed to increase the employability of older people through voluntary work, participation in local policy creation, work for local organisations, and communities and mutual aid, among others.

Is the approach targeted especially at older workers or at all groups?

The approach is targeted especially at older workers.

3.1 Dimensions and quality of work (career and employment security and wages, among others)

Reduced working hours and work adjusted by age

3.2 Values / motivation

Increasing the social productivity of older people, intergenerational cooperation, and developing local communities

3.3 Professional competence (LLL)

Computer skills development and Universities of the Third Age

3.4 Health

N/A

3.5 Close social network

Work within local social networks and increasing the social participation of older people in various social events

3.6 Family and work-life balance

N/A

4. Work after retirement

The programme is mainly targeted at those who wish to work after retirement.

5. Life course orientation

N/A

6. Overarching dimensions of MOPACT touched (gender, older migrants, intergenerational solidarity, disabled workers, social inequality, or regional dimensions, among others)?

The programme supports intergenerational cooperation by involving older people in different social activities that increase their social productivity. There is also an issue of gender involved, as women comprise the majority of one-person households of older people.

7. Linkage to informal work/civic engagement/social volunteering?

This kind of work—informal, civic engagement, and volunteering are the main parts of the programme.

8. Other socially innovative dimensions touched worth mentioning?

Improving the qualifications of people taking care of the elderly.

9. Brief SWOT evaluation including transferability, sustainability, and usability**Strengths:**

Satisfying the various needs of older people

Based on ideas from older people (Council for Senior Policy – Rada ds. Polityki Senioralnej)

Nationwide programme

Weaknesses:

Small budget

No benchmark—this is first long-term programme for seniors

Opportunities:

Demographic changes in Poland—the programme is a relevant answer

Possibility of increasing the budget of the programme in the future

Threats:

Scale of the programme not matching demographic changes

No interest in participating in the programme from some NGOs

10. Further relevant information

[http://www.mpips.gov.pl/gfx/mpips/userfiles/_public/1_NOWA STRONA/Seniorzy/Program ASOS 2014-2020.pdf](http://www.mpips.gov.pl/gfx/mpips/userfiles/_public/1_NOWA_STRONA/Seniorzy/Program_ASOS_2014-2020.pdf)

Good Practice 7

Career reviews

1. Actor

Wojewódzki Ośrodek Ruchu Drogowego (WORD) in Olsztyn. This institution is a local centres for transport education and is responsible for examining drivers and candidates for drivers, conducting technical examinations of motor vehicles, and conducting training activities.

State of the art:

Ongoing

Public incentives used:

No

In practice/idea/proposal:

In practice

2. Reasons

The institution aims at making the most of all employees, no matter their age. The older employees represent highly valuable assets for the organisation because of their knowledge, skills, and experience. Career reviews and personal contact allow for relevant job adjustments, personal development, and knowledge diffusion.

3. Description of approach

Career reviews take place on every day basis. There are also more formal methods of assessment, such as the evaluation interview that occurs once per year (or more frequently). Personal contact is another important means for analysing employees' situations. Together with career interviews, they enable the resolution of any problems arising, to adapt to working hours and conditions, and to determine any requirements for additional training. In the case of mature workers, this helps to recognise their capabilities for further work and to increase their working potential.

Is the approach targeted especially at older workers or at all groups?

The approach is targeted at all groups of workers.

3.1 Dimensions and quality of work (career and employment security and wages, among others)

Adjustment of the type of work to age, flexible working hours, and employment security

3.2 Values / motivation

Personal respect and intergenerational cooperation

3.3 Professional competence (LLL)

Training opportunities for older employees

3.4 Health

Career interviews allow for employers to notice health problems related to work

3.5 Close social network

WORD is a small organisation that forms a close social network

3.6 Family and work-life balance

Possibility of working on part-time basis and opportunities to work after retirement

4. Work after retirement

Work after retirement is possible on part-time or full-time basis. Some employees are willing to work after retirement.

5. Life course orientation

N/A

6. Overarching dimensions of MOPACT touched (gender, older migrants, intergenerational solidarity, disabled workers, social inequality, or regional dimensions, among others)?

Human resources management at WORD in Olsztyn allows for intergenerational cooperation, as younger workers help older workers (e.g. in IT issues), while the latter share their knowledge and experience.

7. Linkage to informal work/civic engagement/social volunteering?

N/A

8. Other socially innovative dimensions touched worth mentioning?

N/A

9. Brief SWOT evaluation including transferability, sustainability, and usability:

Strengths:

Efficient way of recognising employee needs

Built on trust and personal interaction

Inexpensive

Weaknesses:

Only for smaller organisations

It takes time to build trust

Opportunities:

The initiative can be implemented in every small organisation

Threats:

Less funds for satisfying employee needs due to decreasing demand for driving license examinations (demographic changes, legal issues)

10. Further relevant information (also sources such as literature, interviews etc.)

<http://www.zysk50plus.pl/?module=Companies&action=GetCompany&companyId=209§ionId=6>

Good Practice 8

Temporary fixed-term contracts for experts

1. Actor

Centrum Techniki Okrętowej (The Ship Design and Research Centre) in Gdańsk. The centre is a state-owned company responsible for supporting the shipbuilding industry through research and development (R&D), design, and information activities. The laboratories are available for students and research staff of the technical universities to use.

State of the art:

Ongoing

Public incentives used:

No

In practice/idea/proposal:

In practice

2. Reasons

To perform scientific research in the field of ship design and construction, the centre requires specific expertise. To acquire the expertise, the organisation maintains contact with its former employees of various specialisations. The company hires them for specific projects on a temporary fixed-term basis.

3. Description of approach

Former workers of the centre are hired when there is a need for their expertise. They are employed through temporary fixed-term contracts that are usually goal-oriented. The employees are treated as in-house experts. They also work as mentors for younger engineers and constructors.

Is the approach targeted especially at older workers or at all groups?

The approach is targeted at older (former) workers.

3.1 Dimensions and quality of work (career and employment security and wages, among others)

Flexible working time and additional payments for mentoring work

3.2 Values / motivation

Expertise and specific skills

3.3 Professional competence (LLL)

N/A

3.4 Health

N/A

3.5 Close social network

N/A

3.6 Family and work-life balance

Flexible working hours

4. Work after retirement

On average, the centre employs 10 retired employees every year.

5. Life course orientation

N/A

6. Overarching dimensions of MOPACT touched (gender, older migrants, intergenerational solidarity, disabled workers, social inequality, or regional dimensions, among others)?

N/A

7. Linkage to informal work/civic engagement/ social volunteering?

N/A

8. Other socially innovative dimensions touched worth mentioning?

N/A

9. Brief SWOT evaluation including transferability, sustainability, and usability:**Strengths:**

Possibility to use the specific expertise of former employees

Need-based employment

Knowledge diffusion from experts to younger colleagues

Weaknesses:

Retired employees might not be willing to go back to work

No additional system of knowledge storage and management

Opportunities:

Working with experts may attract young people to work for the centre

Threats:

Former employees might not follow the world trends

10. Further relevant information

http://www.cto.gda.pl/index.php?id=informacje_ogolne&L=1 http://www.cto.gda.pl/index.php?id=informacje_ogolne&L=1

<http://www.zysk50plus.pl/?module=Companies&action=GetCompany&companyId=172§ionId=6>

<http://www.kadry.abc.com.pl/czytaj/-/artykul/zarzadzanie-wiekciem-dobre-praktyki-polskich-organizacji>

Good Practice 9

Mature business incubator

1. Actor

The Cooperation Fund Foundation (Fundacja Fundusz Współpracy). The foundation is responsible for managing aid funds on behalf of the Polish government and for assisting with the implementation of EU supported projects.

Fundacja Promocji Inicjatyw Społecznych POLPROM. (eng. The foundation for the promotion of social initiatives) The main goal of this foundation is to promote social initiatives.

State of the art:

The programme was established in 2010 and ran through December 2012.

Public incentives used:

Yes, financed from the Human Capital Operational Programme.

In practice/idea/proposal:

In practice

2. Reasons

The programme was initiated to increase entrepreneurship among older people and to help those that were unemployed or inactive find employment.

3. Description of approach

The programme consisted of creating a mature business incubator, trainings, and advisory activities that were offered to project participants. The programme also offered financial aid. Trainings included business plan preparation, finance management, accounting and legal issues, customer service, marketing, promotion, negotiations, and IT education.

Is the approach targeted especially at older workers or at all groups?

The approach is targeted especially at those aged 45 or older.

3.1 Dimensions and quality of work (career and employment security and wages, among others)

Self-employment

3.2 Values / motivation

Entrepreneurship and new jobs creation

3.3 Professional competence (LLL)

Series of professional trainings for the participants of the programme

3.4 Health

N/A

3.5 Close social network

Trainings enhanced the social skills of the participants

3.6 Family and work-life balance

N/A

4.	Work after retirement
	N/A
5.	Life course orientation
	N/A
6.	Overarching dimensions of MOPACT touched (gender, older migrants, intergenerational solidarity, disabled workers, social inequality, or regional dimensions, among others)?
	N/A
7.	Linkage to informal work/civic engagement/ social volunteering?
	N/A
8.	Other socially innovative dimensions touched worth mentioning?
	N/A
9.	Brief SWOT evaluation including transferability, sustainability, and usability:
	Strengths:
	Comprehensive support for participants
	Long-term financial aid
	Developing the entrepreneurial skills of the participants
	Individual approach
	Weaknesses:
	No relevant benchmark for the programme
	No monitoring of the effects of the programme after its end
	Opportunities:
	The programme may be implemented nationwide
	If the firms will grow, they will create more jobs
	Threats:
	When financial aid end, the new firms may face difficulties
10.	Further relevant information
	http://www.inkubator45plus.pl/ http://www.inkubator45plus.pl/
	http://www.cofund.org.pl/images/PUBLIKACJE/Inkubator_plus/IDP_www.pdf

Good Practice 10

“Be the architect of your own future”. Support for the unemployed aged 45 and older.

1. Actor

Powiatowy Urząd Pracy (Local Employment Office) in Malbork. The institution is a public office responsible for job placement, career counselling, training, payments of benefits, and the organisation of public works and socially useful work.

State of the art:

The programme took place during 2008-2009.

Public incentives used:

Yes, the programme is financed by the Human Capital Operational Programme.

In practice/idea/proposal:

In practice

2. Reasons

Unemployment among people more than 45 years old is significantly higher than in other groups. The employment office decided to treat this group in a unique way. A special programme was created to improve the situation of older people on the job market and to change the attitudes of the employers towards them.

3. Description of approach

The program was launched to improve the situation of unemployed people more than 45 years old, increase their adaptability to different jobs, enhance their motivation and adjust their skills to the needs of the employers. The program included information campaign for the unemployed and the employers, career counseling, IT courses, professional trainings and internships.

Is the approach targeted especially on older workers or on all the groups?

The approach is addressed especially on people more than 45 years old.

3.1 Dimensions and quality of work (career and employment security, wages etc.)

N/A

3.2 Values/Motivation

Fight with unemployment, matching needs of the market with the skills of the unemployed

3.3 Professional Competence (Lifelong Learning)

Developing job market skills

3.4 Health

N/A

3.5 Close Social Network

N/A

3.6 Family, work/life balance

N/A

4. Work after retirement

N/A

5. Life course orientation**6. Overarching dimensions of MOPACT touched (gender, older migrants, intergenerational solidarity, disabled workers, social inequality, regional dimensions etc.)?**

Fight with unemployment

7. Linkage to informal work/civic engagement/ social volunteering?

N/A

8. Other socially innovative dimensions touched worth being mentioned?

Changing the attitudes of the employers towards older workers

9. Brief SWOT evaluation including transferability, sustainability and usability**Strengths:**

Improving the situation of older people on the job market

Increasing professional competences of mature people

Matching the needs of the employers with the skills of the unemployed

Weaknesses:

The scale of the program may not be enough to be a relevant answer to all of the needs

Changing the attitudes of the employers takes time

Opportunities:

Easily applicable in other employment offices

Possibility to implement the program nationwide

Threats:

Program is financed from the European Union funds – necessary to find other ways of financing when financial framework ends

10. Further relevant information<http://zysk50plus.pl/?module=Companies&action=GetCompany&companyId=211§ionId=6>

4.2 Good practices on the demand side of labour

Good Practice 1

We age in plus – training for entrepreneurs

Theme: Training for entrepreneurs to increase their awareness of age management

1. Actor:

Polska Agencja Rozwoju Przedsiębiorczości (Polish Agency for Enterprise Development). It is a government agency responsible for providing the support to Polish entrepreneurs in the implementation of competitive projects. The help is particularly aimed at the sector of small and medium enterprises.

Supporting actor:

Uniwersytet Warszawski (University of Warsaw).

It is the largest university in Poland, established in 1816.

State of the art:

The program took place between 2009 and 2013.

Public incentives used:

Yes – the program was financed from Human Capital Operational Program.

In practice/idea/proposal:

In practice

2. Reasons

Polish society is ageing – people live longer, while the fertility is dropping. This situation may lead to the shortage of labour force in the near future and problems for pension systems. That is why it is necessary to increase the employability of older people. Unfortunately the knowledge about age management and benefits from employing older people is very low among Polish entrepreneurs. The program is designed to fill this gap.

3. Description of approach

The aim of the program was to increase the awareness and improve the knowledge of companies' owners and management about age management and benefits associated with employing older people. The participants were taught among others about best practices in age management, necessary conditions for their implementation, competitive advantages and productivity increase related to the employment of older people. The program included the implementation of the best solutions of age management in the participating firms and organisations as well.

Is the approach targeted especially on older workers or on all the groups?

The training is targeted on all of the entrepreneurs – not only the old ones. However, the training is about age management, thus it concerns older workers.

3.1 Dimensions and quality of work (career and employment security, wages etc.)

N/A

3.2 Values/Motivation

Awareness of age management, improving efficiency and productivity

3.3 Professional Competence (Lifelong Learning)

Professional training for owners and management of firms

N/A	3.4 Health
N/A	3.5 Close Social Network
N/A	3.6 Family, work/life balance
N/A	4. Work after retirement (“silver work”)
	5. Life course orientation
N/A	6. Overarching dimensions of MOPACT touched (gender, older migrants, intergenerational solidarity, disabled workers, social inequality, regional dimensions etc.)?
N/A	7. Linkage to informal work/civic engagement/ social volunteering?
	8. Other socially innovative dimensions touched worth being mentioned?
	Changing the attitudes of the employers towards age management.
	9. Brief SWOT evaluation including transferability, sustainability and usability (the latter for ideas, not practice)
	Strengths: Increasing the awareness of age management Increasing the productivity and efficiency thanks to employing older workers
	Weaknesses: Training should be repeated allowing the participants to keep in touch with the progress in age management
	Opportunities: Training may be continued and offered to other enterprises One can make it obligatory for all firms The materials from the program may be used in economic research
	Threats: Some of the best practices from other countries presented on a training may not be easily applicable in Poland
	10. Further relevant information (also sources such as literature, interviews etc.)
	http://www.zaradzaniewiekciem.pl/ http://www.zaradzaniewiekciem.pl/Employment subsidies to increase the demand for older workers

Good Practice 2**Wage subsidy for employment of people 50 years old or older**

Theme: Employment subsidies to increase the demand for older workers

1. Actor:

Local governor – starosta powiatu

State of the art:

Ongoing

Public incentives used:

Yes

In practice/idea/proposal:

In practice

2. Reasons

Unemployed people 50 years old or older often face difficulties in finding a job. The program aims at increasing their employability thanks to financing part of their wages and salaries from public funds.

3. Description of approach

Any employer who employs the unemployed person may get a subsidy to the wage of the latter. The subsidy cannot be greater than a half of the current minimum wage. Depending on the age of the employee the subsidy can last for 12 or 24 months, while the employment must not finish until the period of the subsidy plus 6 or 12 months.

Is the approach targeted especially on older workers or on all the groups?

The approach is targeted especially on older workers.

3.1 Dimensions and quality of work (career and employment security, wages etc.)

Wage subsidy, employment security for a given period

3.2 Values/Motivation

Fight with unemployment

3.3 Professional Competence (Lifelong Learning)

N/A

3.4 Health

N/A

3.5 Close Social Network

N/A

3.6 Family, work/life balance

N/A

4. Work after retirement

N/A

<p>5. Life course orientation</p>
<p>6. Overarching dimensions of MOPACT touched (gender, older migrants, intergenerational solidarity, disabled workers, social inequality, regional dimensions etc.)? Social inequality – older unemployed people are discriminated on the job market, thanks to the project they gain a privilege</p>
<p>7. Linkage to informal work/civic engagement/ social volunteering? N/A</p>
<p>8. Other socially innovative dimensions touched worth being mentioned?</p>
<p>9. Brief SWOT evaluation including transferability, sustainability and usability (the latter for ideas, not practice)</p> <p>Strengths: Reducing unemployment of old people Reducing the costs of the employers</p> <p>Weaknesses: The program may be costly on a large scale Some people may be employed only due to the subsidy – wrong allocation of human resources</p> <p>Opportunities: Easy to implement anywhere Program can be extended by funding a professional training for the new employees.</p> <p>Threats: Attitudes of the new employees are uncertain – over time they might not be as productive as they could due to employment security</p>
<p>10. Further relevant information (also sources such as literature, interviews etc.) http://zielonalinia.gov.pl/Dofinansowanie-wynagrodzen-za-zatrudnienie-pracownikow-41143</p>

Good Practice 3

Reducing labour costs of older people

Theme: Lower labour costs of older people to facilitate their employment

1. Actor:

Fundusz Pracy (Labor Fund) and Fundusz Gwarantowanych Świadczeń Pracowniczych (Guaranteed Employee Benefits Fund). These are both public funds related to labour market. The first one is responsible for funding unemployment benefits, intervention works, public works, training of the unemployed, labour market research etc. The other is responsible for funding wages and employment benefits of the employees in case of the insolvency of the employer.

State of the art:

Ongoing

Public incentives used:

Yes - exemption from paying social obligations.

In practice/idea/proposal:

In practice

2. Reasons

Labour costs constitute an important factor in determining unemployment in Poland. Reducing them for a particular group of people (the old ones) should help to lower unemployment in this group.

3. Description of approach

The employers who employ women 55 years old or older or men 60 years old or older are exempted from the obligation to pay social obligations to labour market funds for them. If the employers employ the unemployed people 50 years old or older for a fixed period of time (12 months) they do not have to pay the obligations as well. The employers may also get 80% refund of the training costs of the employees 45 years old or older (up to 300% of the average wage in the economy).

Is the approach targeted especially on older workers or on all the groups?

The approach is targeted especially on older workers.

3.1 Dimensions and quality of work (career and employment security, wages etc.)

Increased employability, possibility of higher wages

3.2 Values/Motivation

Fight with unemployment, reducing social obligations

3.3 Professional Competence (Lifelong Learning)

The program includes refunds for the professional training of older employees.

3.4 Health

N/A

3.5 Close Social Network

N/A

N/A	3.6 Family, work/life balance
N/A	4. Work after retirement
	5. Life course orientation Overarching dimensions of MOPACT touched (gender, older migrants, intergenerational solidarity, disabled workers, social inequality, regional dimensions etc.)? Social inequality – older unemployed people are discriminated on the job market, thanks to the project they gain a privilege
N/A	6. Linkage to informal work/civic engagement/ social volunteering?
	7. Other socially innovative dimensions touched worth being mentioned?
	8. Brief SWOT evaluation including transferability, sustainability and usability (the latter for ideas, not practice) Strengths: Reducing unemployment Reducing social obligations Making the employment of older people a good investment Weaknesses: The program may be costly for public finance – if older employees do not pay social obligations then there is less money for social security system Opportunities: The program may be developed further – transferred to other groups of unemployed, conditional on the age of the employees Threats: Over time, as ageing of the society continues, the program may not be enough to face social problems
	9. Further relevant information (also sources such as literature, interviews etc.) http://50plus.gov.pl/Korzysci-dla-pracodawcow-41341

Good Practice 4

Outplacement in the fifties – chances of older people on the labour market

1. Actor:

Radomskie Centrum Przedsiębiorczości (Radom Entrepreneurship Center) in Radom. It is a non-governmental organisation supporting social initiatives aiming at reducing unemployment, as well as promoting entrepreneurship and economic development of the Radom region.

Supporting actors:

Local employment agencies, local social assistance centre

State of the art:

The initiative took place in 2005.

Public incentives used:

No.

In practice/idea/proposal:

In practice

2. Reasons

Older people often face difficulties while looking for employment due to certain discrimination on labour market and negative stereotypes about them. The program was designed to change these perceptions and attitudes towards older people and to increase the awareness of their problems on the labour market.

3. Description of approach

The aim of the project was to popularize the employment of older people, to prevent the discrimination on grounds of age and to overcome the stereotypes associated with the perception of older people on the labour market. The approach was targeted on actors shaping public opinion in the Radom region and the partners of the local labour market: representatives of the media, the employers, local employment agencies, non-governmental organisations and older people themselves. The program involved promotional actions in the media, conferences, trainings, workshops and a project-summarizing publication.

Is the approach targeted especially on older workers or on all the groups?

The promotional actions were targeted on all of the groups of people, but they were promoting the employability of older people.

3.1 Dimensions and quality of work (career and employment security, wages etc.)

N/A

3.2 Values/Motivation

Changing the attitudes towards the employment of older people

3.3 Professional Competence (Lifelong Learning)

N/A

3.4 Health

N/A

3.5 Close Social Network

Various participants of the program from different sides of the labour market constituted a social network during a project.

N/A	3.6 Family, work/life balance
N/A	4. Work after retirement
N/A	5. Life course orientation
	6. Overarching dimensions of MOPACT touched (gender, older migrants, intergenerational solidarity, disabled workers, social inequality, regional dimensions etc.)? Regional dimensions: the initiative was a regional promotional program designed and conducted by the local organisation.
N/A	7. Linkage to informal work/civic engagement/ social volunteering?
N/A	8. Other socially innovative dimensions touched worth being mentioned?
	9. Brief SWOT evaluation including transferability, sustainability and usability Strengths: Increasing the awareness of employment problems of older people Overcoming the stereotypes, changing the perception of older people on labour market Different actors (e.g. media) involved Weaknesses: The program was short, while it takes time to change the attitudes and perception Opportunities: This kind of actions can be organized anywhere The materials from the program can be used further Threats: ?
	10. Further relevant information (also sources such as literature, interviews etc.) http://rynekpracy.org/x/159754

5. Extending Working Lives and Lifelong Learning: Drivers and Barriers

This chapter basis on the National Report Poland written by Karolina Beaumont and Izabela Styczynska identifying and assessing structural drivers of and barriers to innovative, sustainable strategies for extending working lives and lifelong learning on the demand and supply side as a result of WP 43 Task 4.

5.1 Supply Side

According to the definitions adopted in this project, the following analyses of the supply side of labour refers to innovative and sustainable approaches and solutions aiming directly (“immediately”) at enhancing both the employability and workability of the ageing workforce/older workers, in order to make/keep them able, prepared and willing to prolong their working life/extend lifelong learning.

5.1.1 Workability / Employability

Workability and employability are usually used within labour sciences to assess the capacity of work of an ageing workforce / older workers. The term workability refers to individual (older) workers’ ability to master the work-life challenges he/she is confronted with. Workability is linked to the ability held for a given job considering health, skills, values, etc. Employability, that is a multi-dimensional concept, in general refers to a person’s capability for gaining and maintaining employment in the light of individual aspects as knowledge, skills and abilities, and external aspects as legal framework, policies and attitudes both at the institutional and the organizational levels (Naegele and Bauknecht, 2013; Socci and Principi, 2013).

5.1.1.1 Motivation

Macro Level

The participation of older people into the labour market faces obstacles to its fulfillment such as the reluctance from employers to hire older people, lack of flexibility in working conditions, labour market segmentation, and the incidence of negative stereotypes and ageism. Given those obstacles, policy responses have been implemented at national and local level by the Polish government to address them in a holistic way. Among those policies, discouraging early retirement, limit the use of unemployment benefits and pre-retirement benefits, develop age management, improve professional trainings, organizing health campaigns, improve the pensions system, sharing good practices, and encourage the elderly to have another attitude towards work, and improve labour market conditions for women.

One of the most important barriers hampering the employability of older people and quoted in the report on SBG, are stereotypes regarding ageing¹⁴ and age discrimination, which affect

¹⁴ Program Solidarność pokoleń Działania dla zwiększenia aktywności zawodowej osób w wieku 50+, Warszawa, październik 2013 r. mpips, https://www.google.pl/url?sa=t&rct=j&q=&esrc=s&source=web&cd=3&ved=0ahUKEwjX0ZfXmM3NAhVDGZoKHYGgArcQFggIMAI&url=https%3A%2F%2Fwww.mpips.gov.pl%2Fdownload%2Fgfx%2Fmpips%2Fpl%2Fdefaultopisy%2F8350%2F1%2F1%2FProgram50_30.10.2013ost1.pdf&usq=AFQjCNF5P5vwEiY-xDI_U5mFtYk6L5gEqA&bvm=bv.125801520,d.bGs&cad=rja

recruitment, working conditions, older people's well-being, and career development¹⁵. One of those stereotypes is the idea according to which a more experienced worker is more expensive than a young unexperienced one¹⁶, and this is also an argument that makes employers prefer hiring more young people than older workers: they prefer to invest in the training of younger employees than in the training of older ones, since they consider investing in someone who will soon be going on retirement as a waste of time and resources¹⁷. Moreover, older people are reluctant to attend training classes and lifelong learning activities enabling their employment because they do not feel the need and the motivation to benefit from these kinds of services just before retirement¹⁸.

To struggle against unemployment, Poland implemented various programs for supporting the unemployed elderly to reenter the labour market: each unemployed person aged 50+ can expect a proposition from the job center in the six months following his/her registration, either for a job position or an internship, vocational training, or works of general interest¹⁹. Other initiatives at national and local level – with some of them described below – have been implemented to activate older people's employability.

Since January 2016, following the implementation of the Youth Guarantee measure, employers receive public financial aid when they hire a young unemployed person under 30 years old. This financial aid partly covers the salary, as well as health and social insurance²⁰. This measure, even though is a positive initiative to tackle youth unemployment, is a significant structural barrier to the employment of older people, since it encourages the recruitment of young people rather than older persons.

Poland is taking the adequate measures in the framework of its state programs in order to change mentalities in that regard, among others through awareness rising campaigns such as *Wyrównywanie szans na rynku pracy dla osób 50+* ("equal chances on the labour market for people aged 50+"), aiming at breaking the stereotypes about ageing²¹.

Meso Level

The program SBG implemented several policies and innovative initiatives towards efficient and successful active ageing in the field of employability, which have been implemented at various levels – national, local, as well as in the private sector through companies' internal policies. At regional level, the program implemented innovative local initiatives²², which aimed at fulfilling its sub-goals such as the improvement of working conditions, the dissemination of knowledge among employers on the topic of age management, and through multi-institutional cooperation. To illustrate this, it is worth mentioning the project *Dynamizm i doświadczenie – wspólnie*

¹⁵ http://kpsw.edu.pl/pobierz/wydawnictwo/re5/kucinski_sytuacja_osob_starszych_na_ryнку_pracy_w_polsce.pdf

¹⁶ http://kpsw.edu.pl/pobierz/wydawnictwo/re5/kucinski_sytuacja_osob_starszych_na_ryнку_pracy_w_polsce.pdf

¹⁷ idem

¹⁸ idem

¹⁹ <http://www.regiopraca.pl/porta1/porady/prawa-pracownika/pracownik-w-wieku-50-plus-na-jaka-szczegolna-pomoc-moze-liczyc>

²⁰ <http://www.rp.pl/Kadry/309209854-Dofinansowanie-na-zatrudnienie-bezrobotnych-pieniadze-na-etaty-dla-mlodych.html#ap-2>

²¹ <http://warszawa.naszemiasto.pl/artykul/aktywizacja-zawodowa-osob-50-rusza-kampania-spoleczna,2178404,artgal,t,id,tm.html>

²² The number of initiatives has not been made available.

*zarządzanie zmianą*²³ (*dynamism and experience – common change management*), on the theme of intermentoring, which aimed at focusing on the skills of workers 50+, and on their perceptions of their own capabilities in the workplace, and projects involving multi-institutional cooperation between companies and the PUPs (regional jobcentres), such as those involving professional trainings for workers 45+, professional trainings for unemployed people aged 50+ (PUP Kutno²⁴) and complementary financing by the local PUP of the salary of a person aged 50+ when the latter is hired by a company while being unemployed (PUP Myślenice²⁵).

In the framework of the SBG program, a circle of 16 conferences were organised at regional level in Białystok by the Centre for Human Resources' Development and the Ministry of Labour and Social policy with the aim to promote the professional activity of women and men aged 50+, as well as the support to initiatives devoted to extending working lives. The conferences were addressed to representative of local and central authorities, institutions of the labour market, entities relative to social assistance, academics and NGOs²⁶. The box below gives an example of two initiatives, of which the first one has been assessed as innovative by our selection criteria²⁷ and the second one by an expert's report²⁸.

It is to be noticed that the state programs on active ageing also have the aim to address the employability of specific marginalised groups such as women through a focus on work-life balance or self-employment (see corresponding section below) and promotion of employment²⁹; or the chronically ill and the disabled. Indeed, 13.3% of people aged 50-59 are registered as disabled in the country (8.4% of the whole population), and bad health and disability are one of the main reasons for economic inactivity³⁰. As far as the issue of migrants is concerned, it is to be observed that the issue of immigration is marginal in Poland, since the country opened to mobility only in 1991, and entered the EU in 2004. Therefore, the country does not count a significant number of migrants reaching retirement age and who imply issues related to the extension of their working lives.

LOCAL INITIATIVES

Mayday

The project Mayday, realised in the framework of the EQUAL program for years 2004-2008 is sector-specified and addressed to the professionals of the shipyard industry. The program, implemented in the region of Gdańsk, offered 15 modules of educational trainings adapted to the needs of workers aged 50+. Those needs have been investigated beforehand among employers and employees, and the results of the program as well as the solutions it proposes to the employment of older people have been evaluated by independent experts³¹.

The results of the program were quite positive. Around 1200 people benefited from the program. Around

²³ <http://www.drogowcy.org.pl/UploadFiles/File/Program50+.pdf>

²⁴ <http://www.pupkutno.com.pl/Formy-aktywizacji/Archiwalne/Aktualnosci/2012/SZKOLENIA-I-STAZE-DLA-BEZROBOTNYCH-50>

²⁵ <http://www.praca.myslenice.pl/4,dla-bezrobotnych-i-poszukujacych-pracy/12,formy-aktywizacji-bezrobotnych-i-poszukujacych-pracy/155,dofinansowanie-dla-osob-50/>

²⁶ <http://www.rops-bialystok.pl/rops/?p=2996>

²⁷ The Mayday initiative targets a local specific industry using multidisciplinary elements (education and IT proficiency) and tackles the increase of skills and the deepening of knowledge.

²⁸ http://eacea.ec.europa.eu/LLp/project_reports/documents/grundtvig/multilateral_projects_2008/GRUNDTVIG_GMP_142159_IT.pdf

²⁹ http://www.zus.pl/files/8_Robert_Marczak.pdf

³⁰ <http://mopact.group.shef.ac.uk/wp-content/uploads/2013/10/Country-report-Poland.pdf>

³¹ [http://obserwatorium.mazowsze.pl/pliki/files/Desk%20research_50plus_2009\(3\).pdf](http://obserwatorium.mazowsze.pl/pliki/files/Desk%20research_50plus_2009(3).pdf)

800 of them were trained in the field of IT and modern software. Moreover, a modern digital system has been put in place.

SISC- Senior Intergenerational Social Capital

SISC is an EU project for years 2009-2010 which aims at supporting companies in their initiatives to retain the knowledge, experience and “know-how” of highly qualified workers before they retire. Those workers attended trainings for them to become mentors in the aim to pass knowledge to younger workers of the company. The goal of the project was socially innovative in the sense that it “looked” as being conceived for the benefit of the company, but it was actually made for the activation of the 50+ workers. Indeed, the project had the double objective to make the latter aware of their achievements throughout the years and enable them to discover hidden skills, as well as guarantee tools enabling knowledge transfer and multigenerational cooperation. Those objectives had the effect to not only boost older people’s confidence in their own skills, but also to reassure them about cooperation with the young, and this are two key elements encouraging older people to extend their working lives, enable them to have an activity and at the same prevent them to lose the knowledge and skills they acquired³².

Nowe umiejętności –większe możliwości

The initiative, part of the 2004-2009 program “Equality of Opportunities on the labour market for the 50+” funded by the European Social Fund, aimed at increasing soft skills, IT and languages skills of people aged 45+. Implemented in Rzeszów, it involved language and computer classes, as well as interpersonal skills’ coaching. The priority target group was women issued from towns counting less than 20 000 inhabitants³³.

5.1.1.2 Health

Macro Level

The healthcare system still suffers from the communist times in the sense that it lacks modernization³⁴. The specialty of gerontology is very rare in some city hospitals, and thus older people cannot benefit from adequate care. To achieve modernization and tackle this barrier to innovation, Poland needs financing, access to medical infrastructure (rehabilitation centres, ICT tools, developed cardiology and endocrinology departments³⁵) - especially in rural areas – and efficient prevention and awareness rising campaigns³⁶.

Meso Level

The issue of health, long-term care, prevention and access to medical facilities is a crucial issue in Poland. The concept was first incorporated into the Solidarity across Generations program in 2008 with the aim to improve the mental and physical health conditions of older people in order to improve the latter’s quality of life³⁷. The program implied the integration of preventive measures aiming at improving health conditions, notably through early diagnosis of chronic diseases; the building of an identification system for medical treatments enabling prevention

³²http://eacea.ec.europa.eu/LLp/project_reports/documents/grundtvig/multilateral_projects_2008/GRUNDTVIG_GMP_142159_IT.pdf

³³ http://zielonalinia.gov.pl/upload/50plus/Zalacznik_nr_5.pdf#page=599&zoom=auto,236,687

³⁴ http://www.euro.who.int/__data/assets/pdf_file/0018/163053/e96443.pdf

³⁵[http://webapp01.ey.com.pl/EYP/WEB/eycom_download.nsf/resources/Ocena_mozliwosci_poprawy_EN.pdf/\\$FILE/Ocena_mozliwosci_poprawy_EN.pdf](http://webapp01.ey.com.pl/EYP/WEB/eycom_download.nsf/resources/Ocena_mozliwosci_poprawy_EN.pdf/$FILE/Ocena_mozliwosci_poprawy_EN.pdf)

³⁶<https://www.google.pl/url?sa=t&rct=j&q=&esrc=s&source=web&cd=3&cad=rja&uact=8&ved=0ahUKEwiM-sePgpdlNAhXjAJokHbHID8IQFgg0MAI&url=http%3A%2F%2Fec.europa.eu%2Fsocial%2Fblob-Servlet%3FdocId%3D4434%26langId%3Den&usg=AFQjCNEXvb7icq23DNar8sPDSJkUuUaA>

³⁷ <http://zielonalinia.gov.pl/upload/50plus/Program50.pdf>

more efficiently; the monitoring of incapacity to work; and encouraging older workers' choice for private healthcare. No concrete initiatives were identified in the framework of this program, which shows, to a certain extent, a lack of coordination between the creating and implementing institutions.

The Ministry of Labour and Social Affairs was in charge of monitoring the program's activities, and created the National Program Coordinator for this purpose, which also has the task to evaluate the initiatives implemented in that context. Later, the Advisory Council for Seniority Policy was created to address the concept of healthy ageing to the population as a whole, and to do so, highlighted the need to introduce a life-course orientation in the context of healthy ageing, in order to prepare people reaching the age of 50 for physical and mental changes that will occur in their lives in the next decades. The measures taken in this context imply the creation of psychological help during the process of labour market leaving and ageing overall; disseminating information on the concept of healthy ageing and elderly rights among society; encouraging multi-generational discussions in order to break the stereotypes regarding ageing.

The ASOS program also encouraged very dynamically health and physical activities among seniors. Concretely, the innovative initiatives devoted to implementing such measures are the project *Milanowski senior aktywny-sprawny-zdrowy*,³⁸ and *W zdrowym Seniorze – zdrowy duch!* (eng. *Healthy senior- healthy spirit*),³⁹ which provide seniors with sport activities, as well as the project *Profilaktyka najlepszym przepisem na zdrowie* (eng. *Prevention as a best recipe for being healthy*),⁴⁰ which provides seniors with conferences and activities on healthy diet and prevention. Other initiatives, such as *Senior 60+ – świadomy i aktywny obywatel* (*Senior 60+ - aware and active citizen*), proposed physical and cognitive activities as well as consultations with dieticians and other medical specialists.⁴¹

In 2007, the National Health Programme for 2007-2015 was published, which aimed at laying the foundation for health policy in Poland. It also innovatively mapped the required necessary changes in the context of health for the coming years in Poland. These changes included, among others, the promotion of active ageing, active participation in economic, cultural, social, and political life, and the implementation of measures aimed at decreasing the risk of disability, chronic diseases, and premature deaths among the population aged 60+.

In 2011, healthy ageing was one of the priorities of the Polish president of the EU, with the motto "healthy ageing starts at childhood", and an emphasis placed on preventive treatment and the promotion of health. In 2012, policies on the topic of healthy ageing intensified, with a strategy published by the office of the Polish Human Rights Defender, the establishment of a National Health Care Programme for Seniors, the appointment of an entity coordinating senior health policy, and a focus on the promotion of gerontology education for future doctors. In 2013, the White Paper on Healthy ageing was published, including recommendations for the

³⁸ <https://www.mu3w.pl/2021-projekt-asos-2014-milanowski-senior-aktywny-sprawny-zdrowy>

³⁹ <http://teraztwojruch.org/projekt-dla-seniorow-asos/>

⁴⁰ <http://dietetyka.podarujzycie.org/>

⁴¹ http://www.inkubator.org.pl/fi/index.php?option=com_content&view=article&id=139&Itemid=122

improvement of healthcare for seniors.⁴²

At the private level, it is to be noticed that many international companies based in Poland provide their employees with health services. For example, ArcelorMittal, in which 48% of employees are aged 50+, provides direct access to psychologists, psychotherapists, psychiatrists, financial counsellors, professional advisors, and social workers for its 12,000 workers. It also organises a “health week” once a year, with campaigns and assistance to quit smoking, raise awareness about the physical changes people experience after 50, and promote physical activity.⁴³

Looking at the national and local initiatives in Poland, it is to be noticed that no initiatives directly address the issue of mental illness. However, this issue is important because mental health can diminish with age. In Poland, the number of people suffering from Alzheimer’s disease was estimated at just over 500,000 in 2012, which corresponds to 1.31% of the population, and is below the EU average of 1.55%.⁴⁴ The awareness of Poles surrounding the issue of dementia is still a work in progress; hence the lack of initiatives addressing this issue.

LOCAL INITIATIVES

Trener Senioralny

The initiative Trener Senioralny (Coach for Seniors) is an initiative implemented in the city of Poznań by the Foundation AWF. It consists of the provision of free physical activities for people aged 50+. Activities such as Nordic walking, aqua fitness, gymnastics, and Zumba are offered in the city’s parks, and are complemented with competitions, and sports camps offering sports training and educational training sessions. The aim of the project was to increase older people’s physical activity.⁴⁵

IT for Health

ICT for Health was implemented within the framework of the EU Baltic Sea Region Programme for years 2007-2013 with Denmark, Finland, Germany, Lithuania, Norway, Poland, Sweden, and Russia as project partners. The objective of this project was to implement preventive measures through ICT technology, known as eHealth, which enables the establishment of services offering healthcare for all. The aims of the project were the better acceptance of ICT among healthcare services, the sharing and dissemination of knowledge, and the exchange of good practices between the partner countries and regions. The activities of the programme included the strengthening of patients’ responsibility on their own health through the monitoring of their health and the improvement of patients’ mobility through the provision to patients of a multilingual electronic health card for use during travel abroad.⁴⁶

5.1.1.3 Life-cycle Orientation / Reconciliation of Paid Work and Care / Informal Work

Life-cycle-oriented policies are crucial in guaranteeing efficient awareness raising about active ageing. As discussed in the MOPACT report about volunteering activities among seniors (WP

⁴² <http://kigs.org.pl/wp-content/uploads/2015/03/Development-of-senioral-policy-in-Poland-analysis.pdf>

⁴³ https://www.google.pl/url?sa=t&rct=j&q=&esrc=s&source=web&cd=12&cad=rja&uact=8&ved=0ahUKEwjmv-yf-NHNAhXqNJoKHUHKAM04ChAWCCMwAQ&url=http%3A%2F%2Fwww.wszop.edu.pl%2Fdo-pobrania%2Fpobierz%2C27%2C3%2C0%3Ffp%3D.%2Fmedia%2F%2FZeszyty%2520naukowe%2FNr%252010%2FProgramy_pomocy.pdf&usq=AFQjCNF2Miap6eLICFr8gWJxtggtMDs-vw&bvm=bv.125801520,d.bGs

⁴⁴ <http://www.alzheimer-europe.org/Policy-in-Practice2/Country-comparisons/The-prevalence-of-dementia-in-Europe/Poland>

⁴⁵ <http://www.poznan.pl/mim/sport/news/ruszyl-najwiekszy-w-europie-program-darmowej-aktywizacji-osob-starszych-dzieci-i-mlodziezy,94384.html>

⁴⁶ http://www.ictforhealth.net/index.php?option=com_content&view=article&id=73&catid=49&Itemid=27

5.5), people are not prepared to age. Ageing is somehow an uneasy subject to approach due to the many stereotypes surrounding the concept. People are ashamed to age and to look old and they feel useless. More importantly, they often realise suddenly that they have aged and have more difficulty doing certain things now than when they were 20, and they often experience a depression phase at the realisation of the changes they have encountered. Those who are isolated or socially excluded are also ashamed to not being familiar with “young society’s” trends and become even more isolated and excluded, closing off.

The focus on family issues in a life-cycle perspective is a crucial subject in addition to health and employability because it has a direct impact on the elderly’s employment rate and participation in social and political activities. Indeed, as today’s younger generation is tomorrow’s senior generation, the issues of active and healthy ageing and extending working lives need to be approached from the youngest age possible and in a life-cycle perspective and holistic approach. Poland has made progressive and improving measures in the field of family policy to boost employability and facilitate work-life balance.⁴⁷

Initiatives supporting the organisation of multigenerational meetings where younger and older people could meet and discuss various subjects are crucial in the framework of life-cycle orientation. These meetings had the aim to raise awareness among young people about ageing to prepare them for the changes to come for themselves as well as for their relatives, and to enable older people to have contact with younger people in order to not feel excluded from society. The initiatives *Archipelag Pokoleń*⁴⁸ (implemented under the ASOS program) and *Świętokrzyska Ekonomia Społeczna*⁴⁹ (a regional program) are good examples of such initiatives, bringing older people and students from middle school together to discuss different topics—social issues such as gender identity, digitalisation, city space management, and religion, among others, and the topic of the social economy for the second, respectively.

Another issue relative to life-cycle orientation and which is directly related to family policy is that of work-life balance. Here, the main need is to provide additional childcare facilities enabling older people taking care of their grandchildren and to have more flexibility. The provision of childcare facilities has a double aim: firstly, it enables grandparents to work longer instead of looking after their grandchildren and secondly, it enables young mothers to stay in the labour market, as women are the ones whose time is most devoted to their child’s upbringing.⁵⁰ Indeed, the fact that young women leave the labour market because of the obligations of motherhood has repercussions on the labour market participation of older women later, when the cohort ages, as coming back to the labour market after a long period of professional inactivity is a challenge for many women, notably due to the loss of skills and the reluctance of employers. The programs *Partnerstwo –rodzina –równość –praca* and *Elastyczny Pracownik – Partnerska Rodzina*, part of the 2004-2009 programme Equality of Opportunities on the labour market for the 50+, funded by the European Social Fund, were aimed at people aged 45+ with

⁴⁷ http://europa.eu/epic/countries/poland/index_en.htm

⁴⁸ <http://archipelagpokolen.pl/o-projekcie/#oprojekcie>

⁴⁹ <http://jarubasadam.pl/solidarnosc-pokolen-spotkanie-gimnazjalistow-i-seniorow/>

⁵⁰ Eurostat database

the objectives of enabling an effective work-life balance.⁵¹

Difficult access to long-term care and insufficient childcare facilities are the drivers of the phenomenon known as the “sandwich generation”—people aged 50+ who care for their ageing parents or relatives while supporting their own children or grandchildren. Research shows that women are more likely than men to belong to the sandwich generation and provide care for their extended family.⁵² Women of the sandwich generation face significant challenges in terms of family obligations, which makes it difficult for them not only to pursue regular professional activities, but also to have a fulfilling social life, hence the emergence of harmful phenomenon such as social exclusion, lack of personal development, and lack of investment in social activities such as volunteering. Moreover, as the Polish labour market does not allow flexible working arrangements that would enable greater work-life balance, many women leave the labour market at 50 years old.⁵³

Life-cycle orientation means that all social groups are targeted in the implementation of the programme. Specific attention has been brought by the Solidarity between Generations and ASOS programs to women, implementing gender-specific measures because the labour participation of women aged 50+ is relatively low in Poland, and still the object of many challenges, as compared to other EU countries.⁵⁴

Still, in the context of life-cycle policy, the Strategy of Human Capital 2020 initiative was implemented in 2013⁵⁵ with the aim to increase human capital, which is relatively low in Poland, through the whole life-course. This program had the objective of enhancing people’s participation in the social and economic life of the country at a young as well as an old age. Concretely, the priorities of the programme targeted employment, extending of working lives, increasing quality of life, increasing quality of health and of the healthcare system, as well as increasing people’s skills. However, no initiatives have been identified in the framework of this programme, which shows a certain lack of coordination in its implementation.

LOCAL INITIATIVES

Spółdzielnia socjalna “50+” z Gdyni

(Social cooperative – 50+ in Gdynia)

This initiative is a social cooperative created in Gdynia by three women over 50 who are also cancer survivors, because they could not find employment after their health issues. The programme employs, on a flexible working basis, seven women who are in an unstable personal and professional situation and aims at contributing to the professional and social integration of people over 50 who are in a situation of social exclusion. The employees of the cooperative organise events on behalf of the city of Gdynia, provide services on behalf of companies, and benefit from additional trainings improving their competencies.⁵⁶

Social cooperatives are effective means of integrating people who are socially excluded and who have

⁵¹ http://zielonalinia.gov.pl/upload/50plus/Zalacznik_nr_5.pdf#page=599&zoom=auto,236,687

⁵² Himmelweit, S. and Land, H., 2008, “Reducing Gender Inequalities to Create a Sustainable Care System”, Joseph Rowntree Foundation, York.

⁵³ Ben-Galim, D. and Silim, A., 2013, “The Sandwich Generation – Older women balancing work and care”, Report, The condition of Britain, IPPR Institute for Public Policy Research, accessible here.

⁵⁴ http://www.olbrzym.info/wieloaspektowa_charakterystyka_sytuacji_zyciowej_osob_powyzej_50_lat_w_perspektywie_aktywnosci_zawodowej.pdf

⁵⁵ <https://www.mpips.gov.pl/praca/strategie-i-dokumenty-programowe/strategia-rozwoju-kapitalu-ludzkiego-srkl---projekt-z-31072012-r/>

⁵⁶ http://lokalnepartnerstwa.org.pl/file/fm/BIBLIOTEKA/manuale/Aktywizacja_spoleczna_osob_starszych.pdf

been out of the labour market for a long time. It also enables the elderly to feel integrated within a community, to find meaning in everyday life, and to have the possibility to use their skills while adapting to the demands of the tasks they are involved in.

Spółeczny Bank Czasu w Tczewie

(Social Time Bank in Tczew)

This programme was inspired by an initiative from the United States—the Social Time Banks. The concept entails the informal exchange of services, which are payable in time. The services, reaching the number of 70, can include computer lessons to knitting classes. The initiative was implemented by the Municipal Entity for Social Help (MOPS) in Tczew, which also proposed conferences and excursions. The aim of the project is for the 145 participants to build relationships of trust and contribute to helping others. The programme is socially innovative in the sense that it is similar to the phenomenon of the collaborative economy. Its non-for-profit activities entail a peer-to-peer exchange of services.⁵⁷

Care

Older people are the main beneficiaries of the health and social care sectors. In Poland, there is a growing need for facilities and services related to the challenges of the chronic illnesses that occur at older age, as well as for those related to long-term and permanent care. Indeed, the population's ageing and poor health indicates the need for both short-term and long-term care. The main issue in this context is that of the dependency created by the need for long-term care.

Macro Level

Given the rather informal nature of care provided for older people in Poland, statistics are incomplete and have been found only for formal care. However, a survey from 2008 showed that care in family settings is provided to 80% of the people in need of care, which shows a low utilisation of formal care.⁵⁸

The state provides tax relief for expenses relative to the care of elderly relatives as well as a 14 days of paid leave to provide care for a relative. Moreover, a monthly allowance of approximately 130 euro has been made available for caregivers who have left their professional activity to care for a relative.⁵⁹

Meso Level

One of the main priorities of the Polish Ministry of Health is ensuring proper care for the elderly, notably through the implementation of a comprehensive geriatric rating (Całościowa Ocena Geriatryczna) available at every Polish hospital. The rating process consists of a holistic and interdisciplinary assessment of an older person's health condition, aimed at finding the most up-to-date diagnosis in order to prescribe the necessary physical or psychological treatment.⁶⁰

Other governmental policy initiatives established by the Ministry of Labour and Social Policy (e.g. ASOS) focus on assessing the needs and demands of elderly care in Poland. Alongside the Green book, issued in 2010 by the parliamentary working group for the Development of

⁵⁷ http://lokalnepartnerstwa.org.pl/file/fm/BIBLIOTEKA/manuale/Aktywizacja_spoleczna_osob_starszych.pdf

⁵⁸ http://www.case-research.eu/sites/default/files/publications/S%26A%20473_updated.pdf

⁵⁹ <http://www.oecd.org/poland/47877986.pdf>

⁶⁰ <http://www.mz.gov.pl/zdrowie-i-profilaktyka/opieka-nad-osobami-starszymi/>

the Act on the Assistance to Dependent Persons, these policy documents acknowledged the importance of families as caregivers for the elderly, but emphasised the need for an institutional framework of professional services, as it would enable job creation, halt the emigration of caregivers, and increase female participation in the labour market, as women of a working age are often the primary caregivers of elderly relatives.⁶¹

The PolSenior programme (also known as medical, psychological, sociological, and economic aspects of population ageing in Poland) issued a 2011 study describing the needs of older Polish people in terms of care. The study analysed the medical, biological, psychological, social, and economic aspects of ageing. The report stated that about 30% of people participating in the study declared having issues related to depression, which are neither diagnosed nor treated.⁶²

There seems to be an absence of local initiatives in the area of elderly care, as elderly care is still new and under development in the country. Thus, it is likely to be confronted with possible barriers in its implementation at the national and local level. However, these policies and initiatives are also likely to be encouraged by drivers, and the simple fact that there is an absence of policy is a driver to the development of such policies. Only once policies and initiatives on elderly care are issued and implemented, there will be the possibility to assess their drivers and barriers.

Informal Work

Poland is among the countries with the lowest social engagement - except for religious activities, which are very popular among older people. Voluntary activities led by older people often take place in the framework of senior clubs or social assistance centres. The latter, which usually aims at providing leisure activities for older people, also organises activities involving volunteering or informal work.

The concept of volunteering in the context of active ageing is a concept which integrates itself in the Polish mentality with difficulty, as the notions of “social action” and “social work” are associated with something negative in Poland.

In recent years, a growing policy attention has been given to the development of policies targeting older citizens with the objective of stimulating social activity. In 2014, the Foundations for long-term senior policy targeting people 50+ for the period 2014-2020 (Założenia długofalowej polityki senioralnej na lata 2014-2020), aimed, among others, at supporting older people’s social engagement and involvement into informal work, and has been adopted. This measure highlights the potential of older volunteers as care providers for their dependent peers.

At local level, the Warsaw Council for Seniors, created in 2014, aims at supporting the municipality in the implementation of the 2013 programme Warszawa Przyjazna Seniorom (Senior-

⁶¹ https://books.google.pl/books?id=-RBwBQAAQBAJ&pg=PA541&lpg=PA541&dq=green+book+elderly+poland&source=bl&ots=uVZXtz3dRu&sig=wN_Vonm4Jly4V_OWtL-RhLfZsXA&hl=pl&sa=X&ved=0ahUKEwjs0qmv4cjNAhUnJJokHbE9AQEQ6AEIGzAA#v=onepage&q=green%20book%20elderly%20poland&f=false

⁶² <http://212.87.21.2/polsenior/sites/polsenior.iimcb.gov.pl/files/file/monografia/monografiaPolSenior.pdf>

Friendly Warsaw), which, among its objectives, aims at stimulating older people's involvement in voluntary and informal work.

5.1.1.4 Lifelong Learning

Macro Level

The LLL of the elderly in Poland is a concept under development, not only because of insufficient policies implemented in this field, but also because of the attitudes of the elderly. Polish seniors have among the lowest rates of participation in LLL activities in Europe. Indeed, only 0.8% of the 55-64 took part to LLL activities in 2015, which is well below the EU average of 6%. Data shows that Polish women are participating in LLL activities more so than men (0.9% compared to 0.6%) and that 85% of the attendees of Universities of the Third Age are women.⁶³ This corresponds to the situation observed in the EU as a whole,⁶⁴ and can be partly explained by the fact that men have a shorter life expectancy than women.

Meso Level

One of the goals of Solidarity between Generations is to improve the skills and professional competencies of people aged 50+ through measures addressing younger generations in the perspective of a life-cycle approach. The programme encouraged initiatives building educational paths for the elderly, with the provision of individualised professional assistance aimed at guiding the beneficiary in their choice of educational training and motivating them in the pursuit of their educational goals. Moreover, the programme supported LLL activities at the regional level and was addressed to people at risk of unemployment. Lastly, the programme emphasised the need for the teacher to not only share his/her knowledge, but also share his/her motivational and supportive attitude. Later, the ASOS programme implemented 232 health education programs during years 2012-2013.

The ASOS programme aimed at developing specific educational topics for the elderly. Among these topics are new educational technologies and e-learning with a special focus on improving digital literacy among the elderly and preventing digital exclusion, which is a frequent occurrence among the elderly. Indeed, according to the Polish National Statistics Office, 67% of people aged 50+ have never used the Internet, while only 12% of the 60+ use a computer and the Internet regularly.⁶⁵ To respond to this issue, the "e-senior" portal was created. This is an educational portal addressed to people aged 50+ who have never used or do not like using the Internet.⁶⁶ The portal guarantees the safe, efficient, and easy use of the Internet for older people.

Another topic developed in the framework of the programme Solidarity between Generations is health education, promotion, and prevention. Indeed, health is a crucial issue in Poland as figures show that only 25% of Poles live a healthy life, 30% are smokers, 25% do not exercise, 25% suffer from stress at work, and about 20% suffer from obesity. Before this programme, the only programme aimed at addressing health education focused on healthy nutrition and

⁶³ http://arch.ug.edu.pl/pl/administracja/_upload/komunikaty/12480/files/Zalozenia_polityki_senioralnej.pdf

⁶⁴ Eurostat database

⁶⁵ <http://media2.pl/internet/111573-Seniorzy-korzystaja-z-internetu-i-mediow-spolesznosciowych.html>

⁶⁶ <http://e-senior.pl/o-nas>

physical activity, and gained interest only from older people who actually did not need the programme, as the attendees were mostly those who already had a healthy and active life. Moreover, the participants of this program were highly educated with high living standards, and not the elderly who would benefit from health education and a change in their eating and living habits. The Solidarity between Generations programme aimed to fill the gaps of the previous programme, reaching out to people who were socially excluded and who required health education.

The most important institutions offering LLL in Poland are the Universities of the Third Age, totalling 450 in Poland and offering a wide range of educational programs, social activities, and skills development, local cultural offices, social assistance homes, NGOs, and senior clubs, among others, which demonstrates the investment in elderly education and LLL of policy-makers. In Poland, the topics that are gaining the most interest from attendees of Universities of the Third Age are medicine, dietetics, and naturopathy.⁶⁷

LOCAL INITIATIVES

Wielkopolskiego Programu na Rzecz Osób Starszych do roku 2020

(Wielkopolska Programme for the elderly up to 2020)

In Poznań, the Wielkopolski Active Ageing programme, created in 2013 and running through 2020 provides, among others, such as activities, health, and security, educational activities for older people, with a LLL focus and targeted at both the demand and the supply sides.

The programme aims at improving seniors' potential (i.e. skills and knowledge) through study tours, webpages, and social campaigns; increasing the amount of LLL programs for seniors through conferences, courses, and best practices exchange; coaching those who organise educational activities for seniors; and raising awareness on the topic of ageing.⁶⁸

Kawiarenka Internetowa Aktywnego Seniora w Chęcinach

(Internet café for Seniors in Chęciny)

The programme Internet Cafe for Seniors in Chęciny is an initiative of the public library in Chęciny (Voivodship of Świętokrzyskie) aimed at educating older people in being comfortable with the basic use of a computer and the Internet. The objective of this initiative is to improve older people's computer skills, raise awareness among seniors about the importance of digital competencies, and to make modern communication devices accessible. The social innovativeness of the project lies in the fact that the computer classes are organised in a casual and flexible way, enabling the participants to interact with each other, and reducing any barriers the seniors may have regarding digitalisation.

Latające Babcie

(Flying Grandmas)

Latające Babcie (Flying Grandmas) is an initiative of the framework programme Seniors in Action in Łódź. The project is aimed at women aged 55+, but also can include men, and consists of writing letters containing poems and stories for children, which will be the basis for building a play or show to be presented in public libraries, schools, or orphanages. The writing process is overseen by theatre teachers and a psychologist, and the writers receive creative writing consultations. Indeed, the plots of the stories written contain life lessons aimed at strengthening children's self-confidence, explaining feelings such as anger and sadness, and teaching them to be kind for others. The social innovation of this project can be seen in that it combines literary and acting education for older people on one side, and provides

⁶⁷ http://arch.ug.edu.pl/pl/administracja/_upload/komunikaty/12480/files/Zalozenia_polityki_senioralnej.pdf

⁶⁸ <http://docplayer.pl/2232524-Wielkopolski-program-na-rzecz-osob-starszych-do-2020-roku.html>

5.1.2 (Sustainable, Real) Self-Employment

Self-employment and entrepreneurship are very popular among older people. Indeed, almost 120,000 people aged 50+ started their own business in 2011-2012. This corresponds to 13.5% of all companies created during that period. Out of 189 countries, the World Bank listed Poland 108th in terms of ease of doing business⁷⁰ Despite Poland's low employment growth and low employment rate overall, 13.6% of older people (50-64 years old) are involved in early-stage start-up activities, giving Poland the third highest ranking in the EU of early-stage entrepreneurship among seniors. Moreover, around 10% of older people in Poland think about starting a business (ranked eighth in the EU).⁷¹

Meso Level

The encouragement and stimulation of self-employment and entrepreneurship among people aged 50+ have been priorities of the Operational Programme for Human Capital Development through their offer of trainings and individual professional assistance and coaching. Approximately 200,000 persons benefitted from this programme between 2007-2011, and roughly 50,000 created their own business within six months after participating in the project.

However, it should be noted that there is no existing national document addressing the issue of entrepreneurship or self-employment among older people with the aim of extending their working lives. However, the advantage of starting a company at an older age is that the entrepreneur has valuable life and work experience as well as contacts. Moreover, senior entrepreneurship is an important phenomenon that needs encouragement and support, as it contributes to extending working lives.⁷²

As female entrepreneurship is concerned, many programs have been implemented to support business among women aged 50+. Among them, the programme Active Woman, launched in 2007, targeted the promotion of female entrepreneurship for women aged 50+.

A special focus has also been given to the development of entrepreneurship among people aged 50+ in rural areas. The projects implemented by the job centres of Szczecin, Olsztyn, and Warsaw's subsidiary job centre in Radom during 2008-2013 are good examples of the projects meant to develop self-employment among older people in rural areas.⁷³

Other projects have focused on boosting entrepreneurship among women. The project *Aktywizacja zawodowa kobiet po 50. roku życia z Andrychowa i okolic* (Professional activation of women aged 50+ in Andrychów and surrounding areas) focused on increasing the skills of 26 unemployed women aged 50+ in order for them to create their own businesses in tailoring and

⁶⁹ http://lokalnepartnerstwa.org.pl/file/fm/BIBLIOTEKA/manuale/Aktywizacja_spoleczna_osob_starszych.pdf

⁷⁰ <https://openknowledge.worldbank.org/bitstream/handle/10986/16204/19984.pdf?sequence=1>

⁷¹ https://www.oecd.org/cfe/leed/EUEMP12A1201_Brochure_Entrepreneurial_Activities_EN_v7.0_accessible.pdf

⁷² http://www.kozminski.edu.pl/fileadmin/wspolne_elementy/Jednostki/sfop/Artykuly_expertow/28_Przedsioborcosc_Trzecieg_Wieku.pdf

⁷³ http://www.mpips.gov.pl/gfx/mpips/userfiles/File/Analizy/Sprawozdanie%20_50_plus_01_2011.pdf

flower arranging.⁷⁴

LOCAL INITIATIVES

Dojrzały przedsiębiorca

The local job centre of the Gdańsk region implemented Mature Entrepreneur in 2010. It aimed at financially supporting older people in creating and developing a business. The objective of the project was to support entrepreneurship for people aged 50+ in order to help them to remain in or re-enter the labour market through self-employment. Participants received grants of up to 50,000 PLN (about 12,000 euro) to start their business and received business training, coaching, and business advice. The project was hugely successful and enabled the creation of 26 businesses by people aged 50+. It also was made the subject of a TV show in order to promote entrepreneurship and self-employment among older people.

Best Agers

The Best Agers, an EU project during 2010-2012, aimed at using and deepening the professional potential of people aged 50+ through the provision of a webinar series on business planning. It mapped the situation of self-employment in the country, and provided examples of best practices in senior entrepreneurship. The project, encompassing 19 countries in the Baltic Sea region, showed innovation through the monitoring and sharing of already existing best practices and issued a documentary film about four business creators to illustrate life at the crossroads between work and retirement.

Aktywny Emeryt

The programme Aktywny Emeryt (eng. Active Pensioner) was implemented in 2011 by the public agency for the development of entrepreneurship in Poland (PARP). It had the aim of promoting active ageing among the 50+ by raising awareness of the benefits of entrepreneurship and business among older people under the objective of extending working lives. The participants were offered training, educational sessions on soft skills, flexible working time, and flexible business models, and business creation. The project was socially innovative because the participants had the opportunity to share their experience at every stage of their training and business creation.

5.1.3 Work beyond Legal Retirement Age

Despite the tremendous improvements of the past decades, Polish salaries and standards of living are still lower than in other EU countries, and retirement pensions are quite low. Thus, working beyond retirement age can be seen as a necessity for many Poles. However, MO-PACT survey stated that the primary reason older Poles work beyond retirement age is the wish to keep active. Financial reasons are the second most frequent response given.

It is important to note that there are no policies or local or national initiatives aimed at tackling the issue of black market work for older people in Poland.

5.2 Demand Side

Poland has not proposed any socially innovative policies in the area of financial or non-financial incentives for the employment of older workers. Thus, it is impossible to analyse barriers and

⁷⁴ http://zielonalinia.gov.pl/upload/50plus/Zalacznik_nr_5.pdf#page=599&zoom=auto,236,687

drivers in this respect. This means that social innovation is still far from covering all aspects of active ageing and is a concept under development in Poland as compared to Western countries.

Since Polish EU accession, and since the Year of Active Ageing in 2012, much has been accomplished in Poland regarding active ageing policies, notably in the areas of employability, entrepreneurship, socialisation, and LLL. Many of these policies can be seen as socially innovative, but do not define themselves as such. Indeed, the idea of social innovation is perceived in the country as being a vague concept.

Despite the fact that the government offers financing for socially innovative projects, there are some weaknesses, as described above, in the different active ageing policy areas. There seems to be an overall need to increase trust and cooperation in the implementation of active ageing programs in order for them to remain socially innovative and to be attractive for the target group of people aged 50+.

The issue of lack of trust by the recipients is linked to the fact that social capital in Poland is very low. Therefore, in order to increase the efficiency and innovativeness of active ageing policies and to increase social capital, more effort should be put in programs enabling the socialisation of older people. More socialisation would enable the building of relationships and communities, which would not only reduce social exclusion, but also restore feelings of trust among older people. Providing the elderly with access to other people, with the possibility of sharing their experiences, common interests and hobbies, fears, and dreams is a great way to build a better ageing environment and to open their minds to more trust, providing them with more motivation to engage in active ageing initiatives. The challenge to socialisation initiatives is the existing reluctance from older people. Indeed, the general lack of trust is a barrier to the development of volunteering programs - among other initiatives - in the country. These programs thus need to appear more attractive with less administrative burden in order to be accepted by older Poles.

Therefore, initiatives and programs bringing older people together, and programs mixing generations around common activities are very precious drivers of active ageing. Innovative programs focused on these ideas can be found in the framework of projects that are not directly linked to active ageing. Here it would be important to mention the programme *Świętokrzyska Ekonomia Społeczna*, which is a programme implemented in the Świętokrzyskie region on the theme of social economy. The project organised a multigenerational meeting between children in middle school and older people from senior clubs in order to open a multigenerational debate on a subject which is in the development phase in Poland. These kinds of initiatives, which do not have the core aim of active ageing, but rather the promotion of another aspect of social and economic life while including an active ageing aspect in some of their activities, are very beneficial in the sense that it enables the mainstreaming of active ageing into all activities of public and private life.

Moreover, more would need to be done at the local level in order to enable cultivating trust in active ageing programs and facilitate their implementation. Also, the involvement of external

entities could be the solution to the companies' lack of human resources in, for example, conducting mid-career reviews, which could be pursued by a third party such as an independent consultant or labour offices in the framework of their active ageing programs. This requires different entities from different sectors to establish and build cooperation. It also indicates that additional initiatives must be implemented from the side of the companies. Indeed, the active participation of the supply side is crucial to improve the working conditions of older people, to increase recruitment of people after 50, and to reduce gender inequalities among older workers.⁷⁵

As far as cooperation between institutions is concerned, here the issue is also a consequence of the past: during communist times, social innovation was an unknown concept and all powers were centralised in the state, so private entities, including NGOs, and other entities that would be responsible for the implementation of active ageing policies were almost non-existent. Today, 25 years later, NGOs and local entities have developed, and we find many seniors' clubs, foundations, and associations, among others. Added to the active ageing policies implemented by local job centres, municipalities, and regions, among others, we see that the variety of entities in charge of policy implementation is in the development phase.

As far as future steps are concerned, it should be noted that initiatives related to the issue of employability, such as the promotion of a healthy lifestyle, the organisation of touristic activities involving physical activities, Universities of the Third Age, voluntary work, and inter-generational meetings and activities, are part of the solutions presented in the updated version of the Solidarity between Generations and ASOS programmes adopted for the period 2014-2020. These updated versions highlight the multidisciplinary nature of the issues tackled and initiatives proposed. The box below presents the main elements that are key to the successful implementation of socially innovative active ageing policies.

Recommendations by the Authors

1. Establishing and maintaining dialogue and cooperation between stakeholders (associations, local authorities and governments, NGOs, seniors, and Ministries producing policies).
2. Establishing and developing media coverage of awareness raising policies relative to active ageing, ageism, and stereotypes.
3. Establishing and developing policies on active ageing from the youngest age in order to guarantee the effectiveness of life-cycle orientation policies.
4. Encouraging the involvement of employers in the employability of people aged 50+.
5. Introducing and developing IT tools in order to develop social innovation.
6. Guaranteeing and ensuring the monitoring and evaluation of all programmes and initiatives led in the fields of employability, health, life-cycle orientation, and LLL, among others, in order to analyse the lessons learned.

⁷⁵ [https://crzl.gov.pl/images/01 Biblioteka/Publikacje/Projekty_Rynek_Pracy/Wyrownywanie_50/RAPORT_OECD_Lepsza_praca_wraz_z_wiekami_Polska_2014_wersja_polska.pdf](https://crzl.gov.pl/images/01_Biblioteka/Publikacje/Projekty_Rynek_Pracy/Wyrownywanie_50/RAPORT_OECD_Lepsza_praca_wraz_z_wiekami_Polska_2014_wersja_polska.pdf)

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