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# THE ACTIVITY OF SENIORS IN THE POLISH LABOR MARKET<sup>1</sup>

## Demographic conditions of the labor market

Within the last twenty years, there has been a growing number of people in post-productive age of 2.5 million with the simultaneous 10.5% decrease of people in pre-productive age. Changes to the population below 17 years of age and a 4.4% growth of people in post-productive age have significantly influenced the ageing of society. The ageing process may be measured by the demographic old age factor, which is the relationship between the senior population (60 or 65 and over) to the overall population figure. In 1990, this factor in Poland equaled 12.8%, in 2005 – 15.2%, in 2011 – 17.3%, and according to a GUS prognosis for 2020 and 2035 it will equal 22.1% and 26.7% respectively, as shown in Tables 20 and 21. According to the Rosset scale, this means that Poland has entered demographic old age<sup>2</sup>. From an economic point of view, this means that in 2011 – for 100 people of productive age there were 55 people of non-productive age, including 26 people in post-productive age, and it is estimated that in 2035, for every 100 people of productive age, there will be .75 people in non-productive age, including 46 people in post-productive age. Simply put, this is an unfavorable relationship in the population structure according to age, since, according to the prognosis, there will be a growing overload for working people, caused by the growth in the number of people of post-productive age.

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<sup>1</sup> This part of the journal is an updated and extended version of the chapter *Older Adults and Working Life in Poland* in the book edited by R. Kocianova (2013, pp. 93–97)

<sup>2</sup> When the indicator shows a value below 8%, this means demographic youth, 8–10% indicates old age foreground, 10–12% is understood as realistic population ageing, and a value over 12% means demographic old age

**Table 1. Changes in productive and non-productive population number in thousands in 1990–2011**

Age category	1990	2000	2005	2010	2011
Overall	28073	38254	38157	38530	38538
Pre-productive	11043	9333	7864	7243	7147
Productive	22146	23261	24405	24831	24739
Mobile	15255	15218	15251	15424	15418
Non-mobile	6890	8043	9154	9407	9320
Post-productive	4884	5660	5888	6456	6653

Source: self study on the basis of: GUS 2012e. In absolute numbers.

## Definition of seniors on labor market

In scientific publications concerning professional activity, scientific definitions of seniors differ greatly. According to the division of life stages in the subject literature, old age, also called late adulthood, begins – according to E. Erikson – at over 55–65 years of age; according to B. Harwas-Napierała and E. Trempała – over 55–60 – according to Levinson – over 65 and according to Pietrański – over 50–60 (Dubas 2008, pp.20–21).

According to the correlation of these life stage divisions with the population structure in accordance with economic age groups (pre-productive, productive and post-productive), the older people group should include all those individuals who have reached the post-productive age. This is the age at which legally people end their professional work – for men – 65 and over, for women – 60 and over (Law Act – December 17, 1998). However, in the context of research on the professional activity of seniors, slightly different criteria are taken into consideration. On the one hand, this group includes people who are 45 and over, which is a reflection of the policy aimed at prolonging the professional activity of Polish people. On the other hand, the group of 50+ is indicated as socially important from the point of view of demographic changes and their economic consequences. In other cases, the term older people in the labor market is understood as people of pre-retirement age, namely the last 10 years of productive age. Not so long ago in Poland, this phase included people who were 55–64 for men and 50–59 for women<sup>3</sup>.

<sup>3</sup> Until recently, the retirement age in Poland was 60 years of age for women and 65 for men. From January 1<sup>st</sup> 2013, regulations in the *Act from May 11, 2012 – Change of retirement and pension regulation from the social fund* (Dz. U. [Journal of Laws] from June 6, 2012, section 637) were applied. The most important is the change concerning the gradual rise in the retirement age for women and men to reach the parity at 67 years of age. There is no change to the retirement age for women – 60 years of age – born before January 1<sup>st</sup> 1953 and 65 for men born before January 1<sup>st</sup> 1948. The topic is more widely described by M. Zralek in this paper.

In accordance with the European tendency to prolong professional activity (European Commission, 2002) and apply various strategies favoring such policy, the term 'older people' will be understood as people of non-mobile productive age (54–64), which is consistent with recently prepared papers on the situation of seniors in the Polish labor market<sup>4</sup>.

### The situation of seniors in the Polish market – selected aspects

Any analysis of the senior situation in the labor market should start with the changes in the internal structure of post-productive population from 18 to 59 and 64 years of age, which are described in the GUS prognosis for Poland for 2008–2035. The proportions concerning the relationship between the population of a mobile and immobile age are especially interesting.

**Table 2. Population of productive age according to the prognosis from 2010–2035**

Category	2010	2015	2020	2025	2030	2035
People of productive age, including:	24571	23718	22503	21625	21254	20739
In non-mobile age	9277	8713	8431	8802	9630	9905
In mobile age	15294	15005	14072	12820	11624	10834
Percentage of people in non-mobile group of people in productive age	37.8	36.7	37.4	40.7	45.3	47.8
Percentage of people in mobile group of people in post-productive age	62.2	63.3	62.6	59.3	54.7	52.2

Source: self study based on GUS 2009, p. 234.

According to Table 21, a significant decrease in the people of productive age is anticipated with a simultaneous growth of people of immobile age, who are the oldest workers. It is expected that by the year 2035, the percentage of older people in the labor market will have grown to 47.8%, and the percentage of people of mobile age will have decreased to 52.5% (GUS 2009). Thus, there will be a growth in the population at 45–59 and 69 years of age. Poland will suffer from workforce ageing, which means a challenge

<sup>4</sup> According to the terminology of the Central Office of Statistics, the productive age is the age of working ability. For men – 18–64 years of age, for women – 18–59 years of age. In the framework of this category the mobile productive age can be distinguished, which for both groups is 45–64 years of age, for women – 45–59 years of age.

for the people responsible for social policy. The ageing of the workforce is connected with the general tendency of Polish society to age.

In order to alleviate the negative consequences of this anticipated demographic overload, in 2001 the long-term goal for all EU members was marked, which refers to an increase of the indicator of senior employment (55–64 years of age) to 50% in 2010. The appropriate information was included in the Stockholm European Commission Program (2001). According to data from 2012, Poland was still 11.3 percentage points short of reaching the expected goal (see Table 22). Since 2010, there has been in the European Union a new *Europa 2020* strategy, based on which the member countries have prepared their National Reforms Program. This is updated every year in April. One of the strategic goals is to reach the 75% employment indicator of people between 20 and 64 years of age. For Poland it was set that by the year 2020 the indicator should reach 71%. Currently, it is 64.7% (data from 2012), slightly below the EU average (68.5% – data from 2012).

**Table 3. Indicator of employment of seniors at the age of 55–64 in Poland**

Category	2005		2007		2009		2011		2012	
	27,2%		29,7%		32,3%		36,9%		38,7%	
Poland	35,9 M	19,7 F	41,4 M	19,4 F	44,3 M	21,9 F	47,8 M	27,3 F	49,3 M	29,2 F

Source: Self study based on: Eurostat.

The difficulties in reaching the expected 50% indicator for senior employment (55–64) in 2010 were a result of the fact that in recent years in Poland there has been a growing number of people entering the labor market (GUS 2003, 2005, 2007). These included the offspring of the postwar demographic explosion (late 70s and early 80s). Additionally, one should consider the high level of registered unemployment of the last ten years (measured by the end of every year). In the year before accession to the EU, Poland reached the highest level since the transformation, where the unemployment level equaled 20%. By the end of 2012, unemployment reached 13.4%. These factors have led to the situation favoring the freeing-up of jobs held by people who are near the age of retirement. An especially huge challenge will be the increase in the employment of older women, of whom only 29.2% are employed. Despite the fact that in Poland many activities and programs have been launched whose aim is to increase the social activity of seniors, in many cases they are of a short-term character and aim more to increase the proportion of older people in social life rather than to encourage workers to remain in the labor market. According to the authors of *Evaluation of reform program and convergence program of Poland in 2012* there is a lack of integrated initiatives for the benefit of active ageing, which would result in the employment of older people.

On the other hand, it should be underlined that according to data from the representative Research on Economic Activity of People (BAEL) conducted by GUS in 2007–2013, the number of people who work but are of immobile productive age grew to 599 thousand. The growth in the number of working people between 45–67 years of age is mainly a result of the limited ability for early retirement and the legal extension of the age of retirement. This is indicated by the dynamic growth of employment among people over 60 years of age. The number of people employed in this age group in 2007–2013 went up by 315 thousand. On the other hand, in government documents it is indicated that the growth of the professionally active will face a strong barrier because of the demand for work. It was estimated that the level of unemployment in 2013–2014 will be maintained at over 10% (Europa 2020).

In order to improve the level of employment and prevent a decrease in the population of professionally active people, the authors of the national strategic documents indicate the need to activate these social groups, which up until now were insufficiently represented in the labor market. This is mainly the case for youth, women, people over 50, and the disabled (Europa 2020).

In the context of the situation in the labor market, the opinions of employers concerning older employees should be highlighted. There was research conducted in 2010 on enterprises in Gdańsk. The results showed that one of the most important factors in employment is age. The general tendency is that younger employees are more attractive for employers. Among the firms included in the research, 20% did not employ any worker over 45 years of age, and the proportion of people under 45 equaled 70.5% (Perek-Białas, Turek 2011, pp. 131–152). Another source of knowledge concerning the employment of people of non-mobile age is the international research completed in 2008–2011 on senior potential activation in ageing Europe among 1,037 companies (Activating Senior Potential in Ageing Europe – ASPA). The competences of younger and older workers were evaluated. The results proved that younger employees were considered better by the companies' owners. Older workers were poorly evaluated considering the flexibility at work, productivity, creativity, willingness to learn, their health and physical strength, and skills with new technology use. However, their social competences such as loyalty, reliability, and management skills, were highly rated (Perek-Białas, Turek 2011, pp. 131–152).

The research conducted in 2007 on a hundred companies aimed at diagnosing the expectations employers had of employees aged 50+ employees. An attempt was made to distinguish the factors that would convince owners to hire workers aged 50+. The most important expectations were a catalogue of features which elder employees should represent. Among the most often indicated were professional experience, disposition, appropriate qualifications, a steady life situation, and conscientiousness. Another group of factors included legislative solutions: lower labor costs, subsidies, and work law reform, which in its current form prevents the firing of a worker of pre-retirement age (4 years

before retirement). As barriers that are unfavorable in hiring people over 50 years of age, employers indicated the worker's health condition, the lack of certain qualifications, and the effects of a stressful and dangerous work environment (Muszyński 2008, pp. 75–87).

In this context, recent research is also important, conducted among students in the Management and Economy Department of Politechnika Gdańska concerning the significance of the competences of older workers in shaping competition between companies. According to young people's opinions, workers from the 55+ group possess professional competences that may be an advantage in a competitive company. Respondents positively evaluated the ability to work in intergenerational teams (Richert-Kaźmierska, Stankiewicz 2013, pp. 23–26). This creates a chance for the transfer of knowledge and skills between employees.

In this case, a unique project has been *Elder experience – New knowledge, Qualification of Seniors coming from Restructuring Sectors for the Intergenerational Knowledge Transfer*, the aim of which was to gather high quality didactic materials that would allow older people from the restructured branches of the economy to improve their qualifications and continue the process of mutual knowledge transfer with representatives of the younger generations. A course was prepared which allowed seniors to actively partake in the training process of the young through the transfer and evaluation of their knowledge. Seniors would fill the role of experienced mentors.

## **Reasons behind the low economic activity of seniors in Poland**

Professional life may be discussed from at least two angles: a material context – namely the income which a person expects for their work; and in a non-material context – which is the satisfaction one derives from work, the possibility to be in touch with others, the sense of being useful, social position etc. (Szatur-Jaworska and others 2006). Among seniors, the economic dimension of work decreases. This is a result of receiving money from retirement, pension, and other sources. Also, the non-economic dimension of work is not very important among elder people, as reflected in the research (Gutowska 2008, Muszyński 2008).

In the subject literature, there are two basic factors of professional deactivation among seniors. There are both factors that pull seniors away from the labor market (*pull factors*) as well as factors which push seniors towards professional deactivation (*push factors*) (Holzmann, MacKellar, Repansek 2009). Among the pull factors, there are those financial factors which encourage people to retire, connected with the attractive vision of a retired life. Strictly speaking, these are factors that reduce the point of maintaining a presence in the labor market (Walker 1985). However, professional deactivation is also the result of factors that reduce the possibility to hire older people. From the side of the employer, these are: high labor costs, competences, knowledge and skill deficit in this group, and low work effi-

ciency. The reasons most often given for the deactivation of seniors in the labor market are: bad health condition, disability, dissatisfying work conditions, outdated knowledge and skills as a consequence of digitalization and application of new technologies.

According to A. Walker, In Europe the second group of factors is dominant (*push factors*). The exception is Eastern Europe, where in the 70s to 90s of the twentieth century policy favoring early retirement dominated. At that time, the government proposed a liberal policy of sending people to early retirement as a cure for unemployment. These movements were supported by both the government, which was equipped with the tools to prevent social and economic problems, as well as companies themselves, which in a painless way lowered the average age of their workforce. A similar thing happened in Poland during the transformation, where the policy of early retirement was supposed to support the restructuring of the economy.

The share of older workers in the labor market in Poland is very small and in 2011 equalled 36.9% (table 22). The causes of this fact can be traced to the transformation, which brought in the free market, competition, risk, and quick changes that brought a need to acquire new skills and qualifications. Moreover, a significant role was filled by such factors as: high structural unemployment, where as a remedy, people were sent to earlier retirement, the generally bad health condition of older people, although, according to recent research, among middle-aged people (40–60 years of age) the percentage of people who evaluate their health as lower than good decreased in 2004–2009 by 10 percentage points (from 65% to 55% in the 50–59 age group and from 46% to 45% in 40–49 age group) (GUS 2011, p. 44).

One of the reasons behind the low professional activity of seniors is education. The lower the education, the bigger is the risk of getting a low-paid job which does not require high qualifications. There is also the risk of working in unfavorable conditions which are poorly adjusted to the abilities of seniors – namely the wrong work organization, a stressful and dangerous work environment, and such work where physical strength is required. These factors favor the decision to step down from the labor market. On the other hand, older people with higher education are willing to remain in the labor market because of better working conditions, job satisfaction, and a higher salary. This is confirmed by research which show that the biggest working group and at the same time a group with retirement rights are people who occupy specialist jobs (29.2%). Among professions described as “farmers, gardeners, foresters, fishermen” it was 25.9%, 14.9% were people from technical personnel, 18.6% worked in education, 9.9% in public administration and national defence, and 9.3% in real estate (Lange 2008, pp. 49–70).

Table 23 shows that older people still have a lower level of education compared to younger people, but the following years estimated should be a significant improvement in education of people at immobile productive age, which should result in a higher level of flexibility and adjustment to the current conditions in the labor market.

**Table 4. Structure of education of people in the labor market in 2011 (percentage)**

Category	Higher	Secondary	Vocational	Elementary, lower-secondary	Non-defined
Productive non-mobile age (45–64)	13.7	34.0	34.0	14.4	3.9
Productive mobile age (18–44)	24.4	36.6	20.1	11.5	7.4

Source: self study based on GUS 2012e.

Another factor that leads to the professional deactivation of seniors is their developing social background. This includes pensions for disabilities and families, the wide range of benefits and pre-retirement pensions, which currently is regulated by *30 April 2004 pre-retirement benefits Act*. This kind of benefit may be given under certain conditions to women at 55 years of age and to men at 60 years of age. According to the research (Bukowska 2011, pp. 63–77) in Poland, in the group over 50 years of age there has been an intensive retirement tendency within the last 5 years – before reaching the retirement age. Among women between 55–59 years of age, only every fourth remains professionally active, and among men over 60 years of age, professional activity has decreased two times compared to people in the 55–59 age group. According to the research, various types of additional income in the form of retirement, pension for disabilities, and family pension – significantly contribute to withdrawal from the labor market. A very important factor is the duration of receiving such benefits. The longer the duration, the smaller the will for professional activation. However, it is more important to have the confidence that the benefit will be granted rather than its amount. Pension or pre-retirement benefit from the point of view of the receiver is a better solution than unemployment benefit, which is only granted temporarily (Bukowska 2011, pp. 63–77).

Other research (Szukalski 2008, pp. 75–85) conducted among a group of 1500 people, stated a correlation between job satisfaction and the desire to leave the labor market. As it turns out, the greater the job satisfaction, the lower the desire to retire. However, it was stated that younger workers appreciated the financial factors most, but older people highlighted their relationship with their superiors and the work atmosphere. This is very important in view of deciding about leaving or remaining in the labor market. Apart from the factors mentioned that determine professional activation, the stereotypes concerning older workers and the new work organization or the necessity of taking care of other family members are also influential.

According to Krzyżanowska (2011, pp. 105–130), there are three reasons behind the desire to prolong a presence in the labor market. The first refers to the overall bad health condition of older Polish people, multiplied by an inadequate health care system which

makes access to a doctor more difficult. The second reason is connected with the possibility of earning extra money on retirement, both legally and on the black market. The last reason that was mentioned in the author's analysis is a fear of the retirement system and a lack of trust in ZUS.

Other research showed that respondents expected earlier professional deactivation and had smaller sense of ownership towards the moment of stepping down from the labor market (Szukalski 2008, pp. 78–85). This is connected with changes concerning retirement regulations.

### **Legal actions to offer equality to older people in the labor market in Poland**

As was mentioned earlier, employers are not willing to hire older workers because of the 4-year-before-retirement protection law, lower qualifications, and lower effectiveness. Unwillingness to employ older people leads to the phenomenon called *ageism* – discrimination because of age. In order to prevent this, legislators have applied various instruments to equal the chances of older people in the labor market in Poland. One is monitored dismissals. These are applied in the situation where employers are willing to dismiss 50 workers within three months. The employer is obliged to contact the proper employment office and present ways to help the employees released. This help is focused, among other things, on work mediation, professional advice, and training. This instrument is directed at all employees, not only to those who are in the group of immobile, post productive workers. The legal basis of this application is *article 70 of the Act from April 20, 2004 on employment promotion*.

A slightly different solution is the special set of programs for people over 45 years of age, registered as people looking for work and at the same, who are in the notice period for reasons given by the employee. This program is regulated by *article 49 a. from December 19, 2008 on change to the employment promotion and labor market institution act and change in some other acts*. This covers a set of training that allow people to update or gain new skills and qualifications required in the labor market. Its main goal is the professional activation of people at threat of losing their jobs.

Another legal form for equaling the chances of people in non-mobile age in the labor market in Poland is help in finding employment, which takes the form of employment exchange, help in actively searching for work, training for the unemployed, and financing the cost of journeys to the employer. People over 50 use the privilege of priority, which is based on the employment office presenting job offers, attending training or internship etc. within 60 days of the day of registration.

The next form of help is subsidy employment – a kind of employment for which the costs are entirely or partially paid from public funds. Many forms of help may be distinguished. The first are intervention jobs, which are regulated by *article 51 and 59 of the Employment Promotion and Labor market Institutions Act*. Intervention jobs are the em-

ployment of the unemployed by an employer as a result of a contract with the headman and aims at the support of people in a special situation in the labor market. This instrument is especially useful in the employment of people over 50 years of age, since without subsidies they are not willingly hired for work.

The stimulation of the employment of people of non-mobile age takes place through: public work, internships, professional preparations, special programs devoted to participation in a social contract, in local social care programs and individual social employment program, temporary and permanent removal of the employer from the obligation to pay taxes for Work Fund and Guaranteed Social Benefits Fund. Detailed regulations of the instruments given may be found in *Employment Promotion and Labor market Institutions Act* in article 57, 53, 53a–53m, 49a, 50 (Włodarczyk, Paluszkiewicz 2011).

One of the more important solutions is the application in the Work Code regulations connected with an anti-ageist act. The legal solutions were presented in *the Employment Promotion in the Labor market Institutions Act from December 3, 2012 on application of some EU regulations in the matter of equal treatment*. In the documents given a catalogue of criteria may be found for the prohibition of discriminating against older people in the labor market. Despite the differences in the matter of these catalogues, the criterion of age is a constant. In these documents, there are 3 addressees of discrimination prohibitions: employers, labor market institutions, and private employment agencies. These regulations are used by natural persons applying for work and employees in the process of being dismissed from work (Włodarczyk, Paluszkiewicz 2011).

## **Review of chosen strategic national documents in the view of older people's activity in the labor market**

The national strategic documents include: *National Reform Program for the sake of "Europa 2020" project*, *Long-term State Development Strategy, Polska 203. Third Wave of Modernity*, *National Development Program 2020 – Active society, competitive economy, efficient state*, *National Region Development Strategy 2010–2020*, *Innovation and Economic Effectiveness Strategy*, *Transport Development Strategy to 2020*, *Human Capital Development Strategy 2020*, *"Electrical Safety and Environment" Strategy*, *Efficient State Strategy 2020*, *National Safety System Development Strategy RP 2022 and balanced Province*, *Farming and Fishing Development Strategy for 2012–2020*.

Only those documents are analyzed in which issues concerning people of non-mobile, productive age are discussed. National strategic documents are of a hierarchical character and are connected with one another. The information presented below is a condensed view of these documents.

From the point of view of the professional activity of seniors – described in strategic documents – human capital development is extremely important, which is supposed to take place through employment growth and creating the so-called *workfare state*.

Among many intermediate goals which aim to reach this goal, there is one that assumes the creation of intellectual, social and professional activity models for older people based on potential and preventing social exclusion. This refers to the flexible employment of people of non-mobile productive age, the support of silver economy development and the creation of a mix of incomes based on retirement benefits and work salary, which is supposed to lead to a growth in profitability to maintain in the labor market.

The actions which were undertaken in order to improve the employment of people of non-mobile productive age are mainly the planning and application of the national program called *Solidarity of generations. Actions to improve professional activity of people who are 50+*, which started in 2008. The 50+ Program Board and 50+ Social Board were designed, whose task is to prepare recommendations in the area of health, long-term care, lifelong learning, labor market, and social policy. Actions for the benefit of people in the 60+ group were also recommended.

In the framework of *Human Capital Operation Program* projects which are realized by each marshall office and district employment offices, the following areas were set: support for the continuous education of people who are 50+, support for those employed at the age of 50+, initiatives for the benefit of social integration at the age of 50+, professional activation of people at the age of 50+, including the disabled, and initiative promotion among people who are 45 and over. A range of advice and training projects were begun, aimed at the support of older people in the labor market. The support covered 4.1 thousand people over 50 years of age, and the program was realized across 109 district employment offices.

In the framework of recommendations by the European Commission concerning the increase of professional activation age special support was arranged for chronically unemployed people over 50 years of age. The solutions were to include the application of up-to 30% financing for the minimum wage, and subsidization of salary for the long-term unemployed. The duration for support should equal 12–24 months. Another idea aimed at the activation of people of non-mobile productive age, and is a proposal to create a National Training Fund, which main would finance continued education.

The Ministry of Labor and Social Policy also prepared the project *Acts of special solutions for workers and employers for the sake of protection of work places connected with alleviating results of economic slow-down or economic crisis*. The project concerns the subsidization of salaries for people in danger of losing their job and for the costs of worker training.

The authors of the document *Long-term national development strategy* indicate that one of the developmental dilemmas for Poland is the question of how to professionally activate work resources. This is supposed to lead to the growth of tax income and the independence of households. One consequence should be a greater balance in public finances. It is about increasing employment – in other words, it is about creating a mechanism to secure the retirement system through the postponement of the moment of pro-

fessional deactivation. This process will create a need to invest in the re-qualification of people over 50 and 60 years of age, for their knowledge, skills and competences to meet the expectations of employers. At the same time, the necessity of taking action aimed at prevention and health promotion is underlined, since this is the only way to reach the goal of activating the 60+ group. According to *Social Diagnosis 2009*, poor health is one of the main barriers in searching for work. Research shows that social health improvement is an important factor in economic growth.

In the context of the information presented, critical suggestions should be formulated in reference to the system solutions that are presented in national strategic documents, as well as suggestions for changes.

The philosophy of the Polish nation and the governing philosophy is based on such values as “freedom of a person as a citizen, worker, consumer, with all the rigorous rights connected with these roles, as well as a demand for responsibility. Thus, the state is a guardian of freedom, but also fulfills certain intervention functions in the arena of social policies. The state is, therefore selectively active in areas which demand support from the state for the benefit of citizens. This concerns the sphere of safety, law obedience, obedience of laws of equality and justice, security from natural threats as well as from those created by corruption, help in equalling chances, and guaranteed access to goods and services determined as public welfare services (such as social security, health care, education and culture – the access to the internet)” (Polska 2030, Third Wave of modernity, 2013).

The documentary analysis indicates that the state takes too many responsibilities and laws on its shoulders, many of which should be the responsibility of its citizens. The possibility for the effective functioning of the state in many areas included in the strategic documents is practically impossible<sup>5</sup>, though if they are attempted, they will be so

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<sup>5</sup> The state will therefore develop high-quality institutional and extra-familial care for children up to the age of 3, will improve the accessibility and quality of non-kindergarten education, will prevent the marginalization and social degradation of the family and will create a system of substitute care adjusted to the needs of applicants to the system, and a non-financial system of support for families with disabled children, will improve the general level of care for mother and child, will adjust prenatal care to the model of late motherhood, will direct the general education on shaping key competences, will support the digital competences improvement, will update the external examination system and will differentiate forms of school activities, will create the model of work with resources, will improve a new model of teacher training, will increase the attractiveness of the teaching profession, will support the operation – within academies – of the teaching quality provision system; the state will support the development of ambitious educational plans of a noticeably different profile: practical and academic, will support the idea of an increase in the number of absolvents in technical specialties, will limit the mass character of the second degree studies, will promote the integration of studies with professional activity, will support young people in finding their first job, will promote the partnership family model, will project and apply a new social assistance model, will support families with more than one child, will improve accessibility to support provided by public employment services, will extend the range of services and instruments of the labor market in order to promote activation of the unemployed, will increase the age of

against economic and social optimum principles. The help from the state in this dimension is possible provided that the state has resources which come from a variety of taxes. Funds from the European Union are also significant.

There are two types of taxes in Poland: direct (income tax from people – PIT, income tax from corporations – CIT, inheritance and donation tax, tax on civil law transactions, farming, foresting tax, property tax, transport tax, tonnage tax, extraction taxes) and indirect (goods and service taxes – VAT, excise, game tax). Polish taxes, apart from fiscal, fulfill a redistributive role, generating the problem of privileging one group over other. Privileges are arbitrary and depend on political circumstance.

Maintaining state support at the level described in the national strategic documents must lead to a real search for savings, but also to tax rises. The typical example is the regulation from January 1, 2011 that raised the basic goods and service tax, which in Poland equals 23% and is one of the highest in the European Union<sup>6</sup>. The Ministry of Finances explained this decision with a difficult budget situation and the risk of the destabilization of public funds.

The income tax and goods and service tax are an easy source of income for the state, and income from this kind of taxation is significant. These two factors encourage the state to increase public expenditures, bureaucracy and interventionism. Changes in the tax system, for instance a reduction in taxes (or change to the poll tax) with the simultaneous withdrawal of the state from the role of carer will lead to an increase in production, a reduction in the unemployment rate and a significant increase in salaries.

The majority of the problems described in the national strategic documents is the result of state care, social policy and a decrease of intervention in economy and social life would lead to a self-contained solution to the problems connected with the professional activation of people of non-mobile age. This claim is contrary to the view of Friedrich August von Hayek, Noble Prize winner, supporter of the free market, who claimed that the redistribution of income by the state is unfair. He stated that the egalitarianism of the state is impracticable and will do more damage than good (Hayek 1989). Currently, the European Union is following the policy of interventionism which has not had the expected outcome. The European Union was supposed to be the most competitive economy in the world. The realization of this crucial EU strategy was set for the year 2010.

The prognoses for 2050 estimate that the world's 10 biggest economies will be: China, India, USA, Brazil, Japan, Russia, Mexico, Indonesia, Germany, and Great Britain<sup>7</sup>. According to the prognosis, the countries that lead the world have the opposite princi-

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effective professional deactivation, will prevent social exclusion in the matter of housing, will create a new model of care for seniors, will improve the accessibility and quality of this care (catalogue based on national strategic documents).

<sup>6</sup> The basic VAT tax in the EU cannot be lower than 15%

<sup>7</sup> In 2010, the ten biggest economies in the world were: USA, China, Japan, India, Germany, Russia, Brazil, Great Britain, France, and Italy.

ples connected with the economy and the role of the state as those found in Poland. It seems that the time has come to re-think the values which are the foundation of our vision of the country in order to become competitive.

### **Professional Activity of older people – chosen theoretical aspects**

The professional activity of older people may be discussed in many theoretical contexts. The first is the approach called productive ageing. The activity of older people takes here a utilitarian dimension. Productive ageing has two dimensions – external, referring to earning and free work, and internal, which is based on a reduction in the dependency of older people on third persons (Pierson, Castles 2007, pp. 314–315). The basis of this approach is the consideration of work as having the primary value during the whole lifetime. This is connected with the terms success and usefulness. Old age is a time of work for the benefit of society. Older people are therefore not the beneficiaries of previously earned privileges since they are considered an overload for tax payers. Thus the proper activity of older people is permanent work for the benefit of the whole of society. This may be paid work, voluntary work, or caring for children or other older people who cannot handle their lives independently (Bass, Caro, Chen 1993, p. 247). Uselessness is a sin, being needed, a wit. According to Wiśniewska-Roszowska: “inactivity and constant resting are highly-harmful for old people” (1964, p.154).

The idea of constant production refers to Erikson's term of generativity, which occurs at the time of moderate adulthood. The paradigm of productive ageing extends generativity to adulthood. The leader of this approach was a theory of activity and competence theory, which indicated the relationship between activity and life satisfaction; however, the latter in the paradigm of productive ageing is of an over-individual character. The sense of satisfaction through activity for seniors becomes a share of the collective body. (Herzog, Kahn, Morgan, Jackson, Antonucci 1989, pp.129–138). Productive ageing focuses on those values which are desirable from an economic perspective. This is why every activity which cannot be included in the economy is unjustified. This approach is, on the one hand, a source of harsh criticism (Bass, Caro, Chen 2006, p. 247). since it is impossible to direct all the phases of life at one desirable activity; though on the other hand, it legitimizes the application of active ageing policy, which most often means an increase in the percentage of older people in the labor market. This is similar, when it comes to research on healthy ageing, where knowledge is supposed to be used to create the foundations for such social policy which will prolong the professional life of seniors far beyond the current retirement level.

An entirely different tone can be seen in the assumptions of active ageing prepared by the World Health Organization (WHO). This concept is based on the need to keep individuals active for as long as possible. However, the activity goes far beyond the economic sphere connected with the labor market and also refers to the participation of sen-

iors in cultural, spiritual, political, and social life. The concept underlines the significance of health improvement and financial security which should be connected with a growing sense of security among older people. In the context of the labor market, the concept of active ageing refers most to setting the borders of productive age and the provision of better physical and mental health for workers, as well as creating conditions favoring the decision of the individual about the time and way to retire.

In the 60s of the past century, L. Cain (1964, pp. 272–309) presented a model of life length in the context of professional activity. The author distinguished three phases – preparation for work, breadwinner, and retirement. A similar work model proposed by D. Super (Trzeciak, Drogosz-Zabłocka 1999, p. 55), in which the life phase of the individual is subjected to the process of institutionalization and refers to the preparation for the work phase, professional activity, and rest. These models allowed people to experience life in a normative way which was visible in the fact that retirement pensions allow people to manage the participation of people in the labor market. Moreover, this division became a significant point of reference for tracking changes in the structure of the longevity of the individual and observing the complex character of one of the most basic human activities, which is work. Despite their obvious advantages, the models became the subject of harsh criticism. Currently it is known that the longevity of an individual was strongly individualized and its structure significantly weakened. The changes which took place in highly-developed societies – as a result of technological progress – led to the individualization of longevity of individuals. This led to an extension of time in education, searching for temporary work, and frequent changes in workplace, searching for flexible forms of employment, especially for mothers looking after children, young or disabled people, and also older workers who have received their pensions and are not interested in full-time job.

In Poland, a significant influence on the perception of old person activity (including professional), has been had by the concept of preparation for old age by A. Kamiński (1978). The concept was created in the late 70s of the past century and currently has been developed by the following generations of scientists, who extended its areas of meaning: Upbringing by old age or upbringing in old age. Concentrating on only one of the factors of old people's adaptation to the modern society – namely professional work – these advantages should be underlined: the ability to improve the household income and the reinforcement of the sense of usefulness and independence. Also, it was at this time that a more flexible means of retirement was proposed. However, it is worth mentioning that the concept introduced by Kamiński was an answer to the economic, health, and social problems caused by demographic ageing signaled by Rosset (1959) in the late 50s. Kamiński based his theory on the care function of the government, where on the one hand, there are preventive actions aimed at prolonging and maintaining activity among seniors; on the other hand – upbringing activities, both towards the younger generation, which must respect older people – who in turn learn to fulfill the tasks derived from the

final phase of life (Wiśniewska-Roszkowska 1989). M. Malewski (2010, p 12), states that the issues mentioned during conferences by some scientists are connected with raising adults, are only of an archival character. Thus there are progressive changes in the nomenclature and ways to determine the Kamiński's concept (upbringing for, during and through old age), to learning through old age, for old age and during old age (Malec 2011, p. 13). In order not to identify the education of older people with upbringing, there was a change to the name of the discipline from pedagogy of old age to geragogy.

The phases of human life have been divided according to the pre-productive age (up to 17 years of age), productive age (18–59 for women, 18–64 for men) and post-productive age (over 60 for women and over 65 for men). (Klonowicz 1986, p. 35). The subject literature concerning the activity of seniors in a work context highlights the many positive aspects, such as social prestige (Techniczek 1965), sense of usefulness (Piotrowski 1969) and delaying the ageing process (Techniczek 1968). Currently, an age management policy is being applied (see. Kocianova 2012, pp. 111–116), which refers to “actions mainly dedicated to older workers, and aimed at improving their work environment and ability to perform work – the action is undertaken on the national, local, and workplace level. On the workplace level, it is one of the elements of personal policy applied by employers and is set to the maintenance of the employment of people over 45 years of age with maintenance of their work efficiency” (Urbaniak, Wiczorek 2007, p. 11).

## Conclusion

Poland has entered the phase of demographic old age. This may be observed in the growth of demographic overload, especially in the post-productive age. According to the prognosis by GUS, this tendency will only grow stronger, so it is crucial to apply changes which will lead to the alleviation of the negative outcome of this phenomenon. Accordingly, extended action is necessary, starting from changes to employers' approach towards older employees, social campaigns, senior activation programs, the application of lifelong learning strategies, and finishing with legislative changes which will encourage maintenance in the work market. These are ways to stimulate the professional activity of people of non-mobile productive age. In Poland, initiatives have already been taken aimed at adjusting the labor market to the changes which may be observed in the demographic structure – especially the anticipated growth in the population of non-mobile productive age. The prolongation of professional activity time, employment growth, adjustment of work places to elder people, and flexible forms of employment are examples of the directions which have been prepared in detail in the national strategic documents. An analysis of these documents leads one to the conclusion that the economic and social role of the state should be rethought in order for it to become competitive.

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