

*EXLIBRIS*

Biblioteka Gerontologii Społecznej

*EXLIBRIS*

Social Gerontology Journal

1-2 (8)/2014

© Wydawca:

Wydział Pedagogiczny

Uniwersytet Pedagogiczny im. Komisji Edukacji Narodowej w Krakowie

*EXLIBRIS*

Biblioteka Gerontologii Społecznej

[www.bgs.up.krakow.pl](http://www.bgs.up.krakow.pl)

Recenzent:

dr hab. Jerzy Semków, prof. nadzw.

Redaktor naczelna:

Zofia Szarota

Zastępcy redaktor naczelnej:

Elżbieta Dubas

Artur Fabiś

Rada Naukowa:

Beata Bugajska

Małgorzata Halicka

Mala Kapur Shankardass

Nadia Lutsan

Jolanta Maćkiewicz

Marcin Muszyński

Maria de Fátima Pereira da Silva

Jolanta Perek-Białas

Thomas Scharf

Arkadiusz Wąsiński

Tatyana Zelenova

Maria Zrałek

Redaktor statystyczny:

Łukasz Tomczyk

Sekretarz redakcji:

Katarzyna Sygulska

Kontakt e-mailowy [bgs.exlibris@wp.pl](mailto:bgs.exlibris@wp.pl)

Projekt okładki:

Kamil Baś



ISBN 978-83-941568-1-7

Skład:

Studio Grafiki i DTP Grafpa, [www.grafpa.pl](http://www.grafpa.pl)

# Table of contents

## Review articles

Introduction to the issue No. 1..... 5

Introduction ..... 7

*Maria Zralek*

**The social context of ageing in Poland** ..... 9

*Artur Fabiś*

**Educating seniors, conditions for senior education in Poland**..... 41

*Łukasz Tomczyk*

**Methods and forms of senior education**..... 63

*Marcin Muszyński*

**The activity of seniors in the polish labor market** ..... 83

## Reviews

*Artur Fabiś*

Remigiusz J. Kijak, Zofia Szarota, *Starość. Między diagnozą a działaniem*,  
Centrum Rozwoju Zasobów Ludzkich, Warszawa 2013..... 101

*Katarzyna Sygulska*

Joanna Nawrocka, *Spoleczne doświadczenie starości: stereotypy, postawy, wybory*, Oficyna wydawnicza Impuls, Kraków 2013 ..... 103

## News

Call for papers for the Volume V of the series “Czech-Polish-Slovak studies  
in andragogy and social gerontology” ..... 105





# Introduction to the issue No. 1

The series *Exlibris Social Gerontology Journal* is present in the publishing market since 2008. At that time, its first volume appeared. The initiator of creating a new publishing title was the team of researchers and practitioners of the Social Gerontologists Association which president is Artur Fabiś.

The first Editorial Board was created by distinguished scholars, personalities related to scientific community of Polish andragogy and gerontology, led by Elżbieta Dubas, Jerzy Semków, Artur Fabiś, Grażyna Orzechowska, Arkadiusz Wąsiński, Marcin Muszyński. I had a honour of working with these scientists.

The composition of the Editorial Board undergoes slight modification from the current issue, therefore it is necessary to express the words of deepest respect, appreciation and gratitude for the former Editor-in-Chief, professor Elżbieta Dubas, for efficient management of periodical, concern of its high substantial level, selection of excellent reviewers and aesthetic graphic layout.

Problems of volumes released so far was focused around the social, cultural, educational and welfare aspects of aging and old age. The new editorial team is going to continue this line. We want that new edition of Library of Social Gerontology *EXLIBRIS* to become a forum for exchanging ideas of broad range of Polish and foreign researchers. We would like the periodical, which has a semi-annual formula, to serve the open science, therefore from the current issue we place it in digital format.

We introduce new sections documenting important events in Polish social gerontology, we introduce section of reviewing and reporting. We want all environmental initiatives to be permanently marked. The journal is addressed to researchers and practitioners, students and people interested in expanding their knowledge.

Another issue of *Exlibris Social Gerontology Journal*, edited by Artur Fabiś and Aleksandra Błachnio, titled „Spirituality as a category of existence and transcendence in old age” is waiting to be released. There is also a new volume in preparation, the

working title: „Service models for the elderly - international perspective”. We invite you to send texts to the Editor: [BGS.exlibris@wp.pl](mailto:BGS.exlibris@wp.pl)

We inform you that the original version of journal is paper edition. Starting from the current edition periodical is available on the website of Faculty of Pedagogy of Pedagogical University of Krakow.

Editor-in-Chief  
(-) Zofia Szarota



# Introduction

This issue is a new opening of the series called *Exlibris Social Gerontology Journal* (Exlibris Biblioteka Gerontologii Społecznej). The undertaking is a continuation of a concept of a gerontology periodical realized in seven issues published by: The School of Administration in Bielsko Biala (Wyższa Szkoła Administracji w Bielsku-Białej), Andrzej Frycz Modrzewski Cracow University (Krakowska Akademia im. A. Frycza Modrzewskiego w Krakowie) and Silesia Scientific Publishers (Wydawnictwo Naukowe Śląsk). Starting with the current issue, the series becomes a regular half-year, adopting the name *Exlibris Social Gerontology Journal* (Exlibris Biblioteka Gerontologii Społecznej) published by Pedagogy Department of the Pedagogical University of Cracow (Wydział Pedagogiczny Uniwersytetu Pedagogicznego im. Komisji Edukacji Narodowej w Krakowie).

The first issue of the periodical is a result of work of the research team from the facility that leads the periodical, namely The Pedagogical University of Cracow (Artur Fabiś and Łukasz Tomczyk) and fellow didactic facilities: University of Lodz (Uniwersytet w Łodzi) (Marcin Muszyński) and Humanitas University (Wyższa Szkoła Humanitas) (Maria Zrałek). The final outcome—namely the english version issue, was created by extending, completing and changing the texts included in the paper by R. Kocianová (red.), *Analysis and comparison of forms and methods for the education of older adults in the V4 countries*, Univerzita Karlova v Praze, Filozofická fakulta, Praha 2013. The first issue of the periodical has its own polish-language equivalent as a monograph prepared by the authors: A. Fabiś, M. Muszyński, Ł. Tomczyk, M. Zrałek in the book “Starość w Polsce. Aspekty edukacyjne i społeczne”, Published by The State School of Higher Education in Oświęcim, 2014 (Państwowa Wyższa Szkoła Zawodowa w Oświęcimiu).

In the pilot issue of the *Exlibris Social Gerontology Journal*, we would like to present the english-speaking readers with a set of factors determining the functioning in the old age in the socio-educational dimension. The intention of the authors was to characterize the ageing process through reference to the most updated research results

and literature in the current Polish educational and social gerontology literature. The first issue is addressed to readers outside Poland and to students learning in Poland in the frame of international exchange of the humanistic and social faculties.

The editing team of the *Exlibris Social Gerontology Journal* encourages Polish and foreign authors of the science facilities specializing in the topic of ageing and old age in the educational and social dimension to take part in work on following issues of the periodical. New edition of the periodical gives the authors and the leader team new possibilities. Based on that, planned is a range of actions based on promotion of the work results of the authors not only through traditional publishing process, but also through sharing the collected texts in digital form. Moreover, in accordance with a long publishing tradition (series has been on the market since 2008), we hope to include the periodical in Polish and foreign reference lists.

**Editorial team**



Maria Zrałek

# THE SOCIAL CONTEXT OF AGEING IN POLAND<sup>1</sup>

## The old person from a demographic perspective

The ageing of societies is one of the most serious economic and political challenges for modern states. Poland cannot avoid this progressive process either. The degree of the problems stemming from demographic changes is even bigger and requires that complex steps be taken. The ageing of the population is traditionally treated as troublesome and overwhelming for the economy, particularly for the stability of the state's public finances. Along with an ageing population, there is also an increase in spending on benefits and services financed by public resources. Such an approach poses a serious threat to older people and often leads to their marginalization. The potential of seniors, however, remains unnoticed. In the European Union, the key strategy "*Europe 2020. Strategy for smart, sustainable and inclusive growth*" (KOM) 2010, describes the ageing of society as a challenge but also as an opportunity for sustainable economic and social growth by using the potential of older people. There is a need to focus more attention on the various consequences of the population's ageing, as well as on the necessity to take action on the national, regional, and local level: action that would enable the longer professional activity of seniors, their active participation in social life, and the creation of conditions for a healthy, independent, and satisfactory life.

According to the UN classification, in 1980 Poland exceeded by twofold "the demographic advanced old age threshold", which means that the percentage of people aged 65 and over constitutes 10% of the general population. The population prognosis for 2008–2035 made by the Central Statistical Office (GUS, 2009) points to a significant increase in the number of old people (aged over 65) – from 13.5% in 2007 to 23.2% in 2035 (tab. 1)

---

<sup>1</sup> This part of the journal is an updated and extended version of the chapter Wider Social Contexts of the Education of Older Adults in Poland of the book edited by R. Kocianova (2013, pp. 8–90).

**Table 1. The percentage of people aged 65 and over in the general population – prognosis**

Age	2007	2008	2009	2010	2015	2020	2025	2030	2035
65 and more	13.5	13.5	13.5	13.5	15.6	18.4	21.0	22.3	23.2
80 and more	3.0	3.1	3.3	3.5	3.9	4.1	4.1	5.5	7.2

Source: *Population prognosis for 2008–2035* (2009), Warszawa, GUS, p. 219.

*The 2012 Ageing Report Economic and budgetary projections for the 27 EU Member States (2010–2060)* predicts an increasing share of the population aged 65 and over. According to the prognosis, the number of people in Poland in 2060 will decrease to 32.7 million with a simultaneous growth in the share of people aged 65 and over – from 13.5% to 34.5%. The latest demographic predictions by Eurostat from the so-called base variant calculations conducted for the Working Group on Ageing Populations and Sustainability, which was used by ZUS for its prognosis of income from the retirement budget, indicates a very advanced ageing of the Polish society. According to the calculation, and considering the raised retirement age, the number of people at post-productive age in 2040 will be 7% higher than in 2013 and 29% higher in 2060. The share of the population of a productive age will decrease from 6.3% in 2013 to 53.1% in 2060 (ZUS, 2013, p. 11).

Poland will have one of the least favorable age structures in Europe. These disadvantageous demographic changes are the consequence of a low birth rate with a concurrently increasing life expectancy. The average life expectancy of a newborn male child increased in 1991–2010 from 66.23 to 72.10 years and for a female from 75.24 to 80.59 years. Poland is characterized by the biggest difference in the life expectancy of men and women in Europe – in 2009 it was 8.6 years (in the EU 5.4 years). A further increase in the average life span is anticipated. In 2035 it would be 82.9 years for women and 77.1 for men (table 2).

**Table 2. Anticipated life expectancy for males and females in 2007–2035**

Age	2007	2010	2015	2020	2025	2030	2035
Females	79.7	79.8	80.2	80.8	81.5	82.2	82a.9
Males	71.0	71.4	72.3	73.4	74.6	75.8	77.1

Source: GUS, 2009, p. 183.

One of the more difficult questions in evaluating the population's ageing process is to determine the moment when individual old age begins since there is neither agreement nor one standard for setting the limits of old age. Various contexts of research refer

to various approaches to old age. The most commonly used criteria are: *biological* – defining the changes in body function; *economical* – determining the actual limit for the end of professional activity; *legal* – setting the limit of post-productive age; *calendar* – setting the number of years that a person actually lives (Frąckiewicz i Wachelko, 1987). Identifying old age on the basis of the calendar age is most often used in the scientific works. According to E. Rosset: “only by strictly setting the old age limit can we open the door to statistical research on the population of people in old age” (Rosset 1967, p. 14). The lack of a standardized old age limit is also visible in the literature of the subject. Usually, it is considered to be reached at the age of 60 or 65. The review of the different divisions is depicted table 3.

According to research on public opinion, old age begins after the age of 63 years and 3 months is reached. Between 1998 and 2012 the old age limit shifted by 2.42 years in social perception and varies depending on the age of the respondents. For older people, this stage of life begins later than according to young people. The Eurobarometr studies (*Eurobarometr 76.2*, 2011) brought similar results – the beginning of old age is set at 63 years (the EU average is 64). Thus, determining the old age limit is differentiated.

**Table 3. Old Age phases**

D.B. Bromley	S. Klonowicz	J. Kocemba	WHO
<ul style="list-style-type: none"> <li>• Up to 65: time before leaving work</li> <li>• Over 65: retirement</li> <li>• Over 80: old age</li> <li>• Max. 100 years of age: late old age</li> </ul>	<ul style="list-style-type: none"> <li>• Old age – 60–79 for women; 65–79 for men</li> <li>• Aged old age: over 80 for men and women.</li> </ul>	<ul style="list-style-type: none"> <li>• Early old age – also called third age, young old 60–75 years of age</li> <li>• Old old – 75–90 years of age</li> <li>• Oldest old long life – 90-110-120 years of age</li> </ul>	<ul style="list-style-type: none"> <li>• 60 years of age – the beginning of old age</li> <li>• 70 years of age – advanced old age</li> <li>• 80 years of age – old old</li> <li>• 90 years of age – longevity</li> </ul>

Source: Szarota 2004, p. 27.

Determining what constitutes old age as a legal criterion is important in terms of retirement pensions. The issue of retirement benefits (determining the age at which people are to be given a pension, the valuation of services, the operation of Open Retirement Funds etc.) is one of the most serious problems that Poland currently faces. In 2000–2010 the number of pensioners increased from 3.67 million to 5.26 million. This is a significant load for the state to bear due to the changing population age structure. It became necessary to introduce the pension system reforms of 1999 when the distribution method was replaced by the capital method. **The statutory retirement age is 60 for women and 65 for men (Dz. U. 2009 no 153). Since 1 January 2013 the retirement age is being systematically increased to 67 for men and for women. For women this**

**process will have been completed in 2040, while for men in 2020.** The right to early retirement has been removed and the state has introduced so-called “bridge” pensions which allow people who worked in special conditions or in a special character to retire earlier (Dz. U. 2008 no 237).

**Table 4. Life stages of seniors according to *Senior agency***

<b>Criterion</b>	Masters of the situation – 50–59 years of age	The liberated – 60–74 years of age	Peaceful – 75–84 years of age	The oldest – 85 years of age and more
<b>Money</b>	High income	Max. income, the golden age of consumption	Purchasing power and the will to buy lessens	Many are in an uncertain financial situation, especially widows
<b>Health</b>	Vast majority enjoy good health, decrease in sight, menopause in the case of women	Still good health; sight and hearing continue to deteriorate	Health becomes the most crucial factor, the problems mentioned earlier escalate, gesture precision deteriorates	High percentage of dependent people

Source: Senioragency 2007, p. 110.

Old age is heterogeneous. In the subject’s literature, it is divided into a number of phases connected with various needs. The needs are different for people in early old age, and different in old old age, although they are determined individually. However, three factors fulfil a crucial role in each stage of senior life. According to *Senioragency*, these are: health, money, and free time (Bombol, Słaby 2011, p. 110–111). On a different level, they indicate certain behaviors and a set of directions for actions addressed to this category of people. These are presented in Table 4.

### **The material situation of seniors in Poland**

The material situation of seniors is determined largely by the amount of pension received. Pensions are basic, and most often the only source of income in a senior household. In Poland, pensions are paid into a non-agrarian social security system, which includes the Social Insurance Institution (ZUS) and the so-called uniform departments: Ministry of National Defense (MON), Department of Justice (MS), Ministry of Internal Affairs (MSW) and in the agricultural system – Farmers Social Security Fund (KRUS). The value of any pension varies. The average pension granted by MS, MON, and MSW is significantly higher than pensions granted by ZUS and KRUS.

**Table 5. The number of pensioners and the average value of benefits in 2011\**

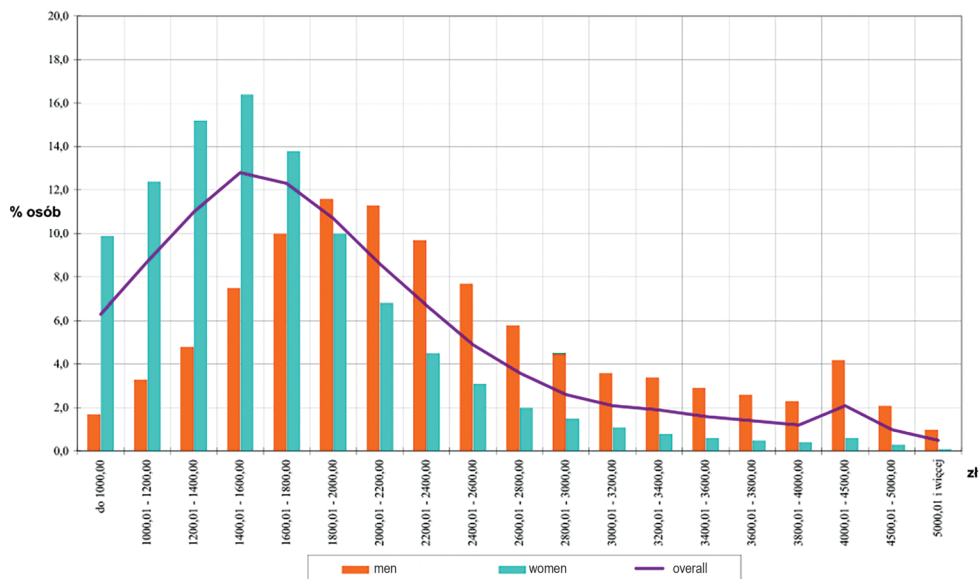
Institution	Beneficiaries	Number of pensioners (in thousands)	Average pension
Social Security Fund	Workers included in the common social security	4 979.1	1 783.06
Ministry of National Defense	Professional soldiers, counter-intelligence service and Military Intelligence	106.2	2 986.60
Ministry of Internal Affairs	Public security officers (Police, State Protection Office, Intelligence Agency, Internal Security Agency), Central Anti-corruption, border guards, Public Fire Department)	136.6	2 994.70
Ministry of Justice	Prison Service Officers	21.3	3 160.10
Farmers Social Security Fund	Farmers	1 056.3	1 028.51

Source: GUS 2012g, p. 39, 45, 47, 65, 71, 73.

The main source of current income for seniors is the pension granted by the common social security system (79% of pensioners receive benefits from ZUS). Pensions in Poland are relatively high compared to the average wage. In 2000 this relation was 63.7% but in the following years it became less favorable – in 2012 it was 62.9%.

The value of pensions varies greatly. This value is determined by gender, salary, practice, and place of work. In 2012, among all pensioners (GUS 2013a, p. 284) the largest percentage of pensioners (13.8%) received pensions equal to 1400–1600 PLN. The percentage of pensioners who received pensions equal to 1600 PLN, was 44,3%. More than two thirds of pensioners (67.0%) received a pension lower than 2000 PLN. Only 2.4% of pensioners received more than 4000 PLN. The biggest division in the value of pensions is according to gender. Women received much smaller pensions than men. The percentage of women who received pensions up to 1600 PLN was 51.9% overall, whereas this was the case for only 17.3% of men. Also, of those pensioners who received up to 2000 PLN, the vast majority were women: 75.7% against 38.9% for men. What is more, of the richest pensioners (more than 4000) only 1% were women and 7.3% were men (ZUS 2013, p.13). Differences in the value of pensions according to gender are illustrated in Graph 1.

At the end of 2012 (GUS 2013a, p. 298), the average available monthly income of a senior household equaled to 1361.1 PLN per person, whereas in Poland it was 1278.43.



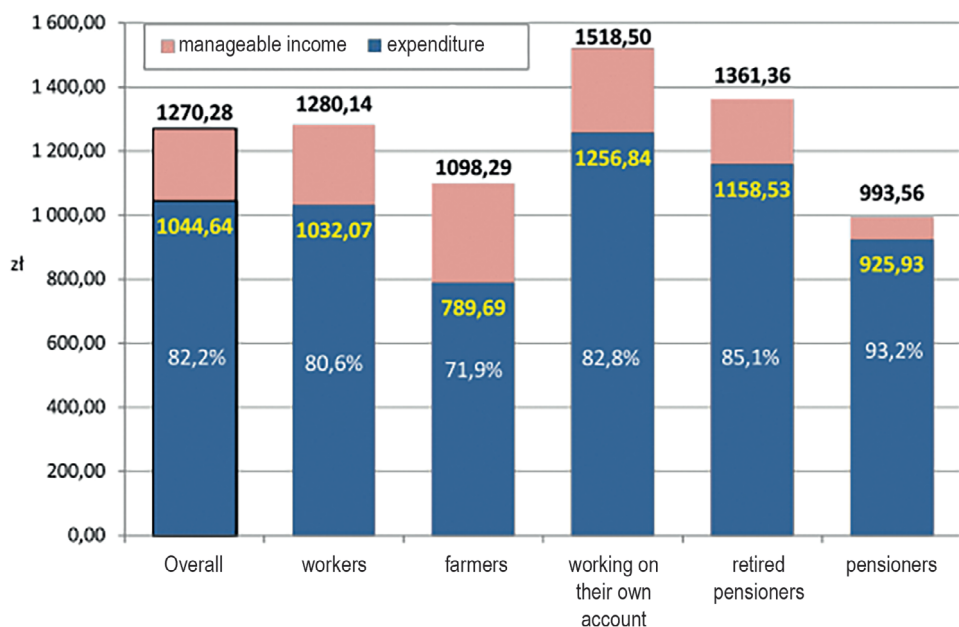
**Graph 1. Pensioners who receive benefits from ZUS according to the value of the pension and the gender of the pensioners in March 2013**

Source: ZUS 2013, p. 13.

At the same time, senior households (except households who work on their own account) have the biggest overall monthly expenses – 1164.03 PLN (the approximate average in Poland is 1050.78 PLN). The correlation of income and expenses in senior households amounts to 85.1%. This means that senior households which live off pensions are characterized by low flexibility when it comes to the disposition of income. A comparison of income and expenditure within senior households and typical households is illustrated in Graph 2.

The unfavorable material situation of seniors is a result of a number of factors. One of the most crucial factors is the fact that senior households are very often one-person households, which makes it impossible to divide costs and expenditure among other members of the household. Moreover, seniors have very limited (or no) possibility to improve their financial situation by getting an extra job. This derives from the state of health of seniors and the overall situation in the labor market. High unemployment among the younger generation means that very often a pension is the only regular source of family income.

This low standard of living is also a result of the specific structure of expenses in senior households. The significant share of expenditure of senior households are, apart from health expenses (7.8% of expenses of seniors compared to 4.8% for people overall) and food expenses (27.7% and 24.8%), are expenses connected with mortgage and



**Graph 2. Income and expenses and share of the average monthly expenses in the manageable income (per person in the household in March) according to social-economic groups**  
Source: GUS 2013b, p. 3.

energy sources (24.07% compared with 20.16% overall). The share of expenses for food, health, and household maintenance is 49.8% overall, whereas the share of these kinds of expenses in senior households equals 59.6% (GUS, 2012d, tab.3).

The material situation, apart from the amount and ability to dispose of the income, is determined by family possessions, which in turn is determined by whether the household is equipped with devices, equipment and other goods in constant use. In some cases, the wealth of households is improved by their non-material worth – education, health, free time etc. (Maciejewski 2003, p.69). If only the material resources of senior households are considered, it may be suggested that in the matter of basic goods, they do not differ much from other types of households, whereas in the matter of modern devices the differences are considerable. As far as senior households are concerned, there has been an increase in the percentage of people in possession of a radio and a decrease in the number of people in possession of TV sets or cable TV. Pensioners more often use stationary phones but they less often have mobile phones. Also, the share of households with automatic washing machines, microwave ovens or dishwashers is smaller, and this is a significant inconvenience for seniors. The biggest difference between a senior household and a regular household can be seen in the relative ownership of two objects: the personal computer and the car. In both cases, the difference is nearly double.

**Table 6. Division of households provided with chosen devices of constant use according to socio-economic groups in 2012**

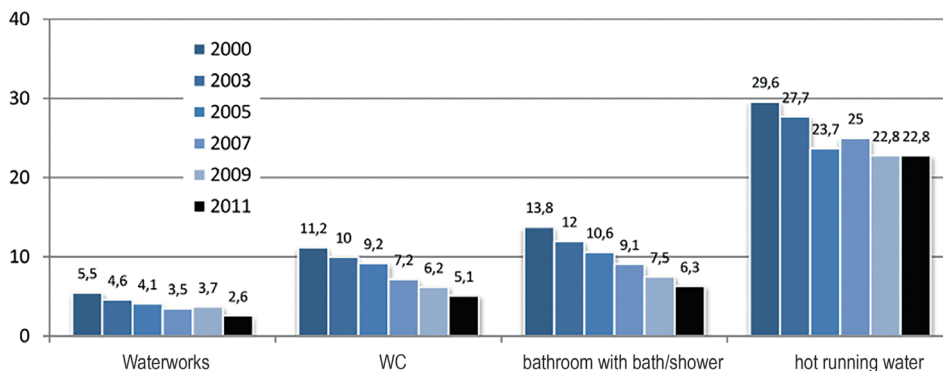
Objects of constant use	Households					
	Overall	Including				
		Employers	farmers	Retired and pensioners		
	Overall			Retired	pensioners	
Percentage of households in possession of goods						
TV set	98.4	98.6	99.0	98.4	98.4	98.2
Satellite or cable TV device	69.4	76.5	59.7	60.9	61.8	57.0
Digital camera	49.4	65.5	54.5	22.9	24.2	17.6
CD player	7.7	10.0	7.6	4.1	4.3	3.2
DVD player	48.1	58.7	58.7	31.8	32.7	28.0
Personal computer	68.3	88.2	76.9	35.3	35.4	34.6
Mobile phone	92.0	99.3	96.8	80.0	80.0	79.9
Printer	37.2	49.0	47.2	15.6	16.4	12.3
Washing machine or centrifuge	11.6	7.9	26.3	16.0	15.4	18.6
Including automatic washing machine	92.3	96.1	91.1	87.5	88.2	85.0
Refrigerator and freezer	98.4	98.6	99.0	98.4	98.4	98.2
Microwave oven	54.3	64.5	60.5	37.8	37.9	37.0
Dishwasher	19.5	24.6	19.8	8.7	9.5	5.8
Personal automobile vehicle	60.1	74.0	91.1	36.1	39.2	23.6

Source: Prepared on the basis of the state at the end of each quarter 2012, GUS 2013a, p. 316.

Any analysis of the level of equipment possessed by senior households should include the fact that very often the equipment was bought many years ago and shows signs of wear. There is no possibility to evaluate the quality (and value) of such devices. The research on household budgets concentrates only on the quantity aspect.

One of the factors that determine the material situation of seniors is housing conditions. This evaluation is more difficult nowadays, since data from the 2011 National Census do not include the housing situation of many citizens. However, it can be indirectly shown that it is certain that the housing conditions of seniors have improved. The *Diagnoza Społeczna* research from 2011 (Czapiński, Panek, 2011) indicate that there has

been a decrease in the share of apartments that are not equipped with devices and installations in 2000–2011. Thus, senior apartments are not different from apartments within the remaining socio-economical groups as far as equipment and technical-sanitary installations are concerned. The data is presented in Graph 3.



**Graph 3. Percentage of households which did not possess the selected devices and installations in 2000–2011**

Source: Czapiński 1., Panek T. (edit.) 2011, p. 93.

A very important factor in the evaluation of senior housing conditions is subjective feeling of the inhabitants, since they determine the quality of life. According to research by CBOS (CBOS, 2010, p.3), the level of satisfaction of older people with their accommodation conditions in Poland is relatively high. The “satisfied” group includes almost three quarters of respondents (71%), of which almost one-fourth (23%) are even very satisfied. Only 8% were dissatisfied with the current state of matters (Table 7).

**Table 7. Satisfaction with housing conditions and a subjective evaluation**

How would you evaluate your housing conditions	Satisfaction with housing conditions in %				
	Very satisfied	Rather satisfied	Average	Rather dissatisfied	Very dissatisfied
Very good	58	38	3	1	0
Rather good	25	60	13	1	1
Average	11	45	35	8	1
Rather bad	2	17	35	30	16
Very bad	1	4	17	25	53
Overall	23	48	21	6	2

Source: Message from research by CBOS, 2012, p. 3.

The level of poverty in a household that lives off pensions was lower than the overall average of households. Extreme poverty – the minimum of existence<sup>2</sup> – in 2012 was the case for 4.3% of seniors in households in comparison with 6.2% of overall households; relative<sup>3</sup> poverty – 11.9% and 16.3%; and statutory poverty<sup>4</sup> 3.6% and 6.9% (the situation of households in 2012, dok. electronic). The data is presented in table 8.

**Table 8. Indicators of the threat of poverty according to selected socio-economic features of households in 2010–2012**

Specification	Percentage of people in households of the income lower than:					
	Edge of extreme poverty (min. Existence)		Relative poverty		Statutory edge of poverty	
	2010	2012	2010	2012	2010	2012
Overall	5.7	6.8	17.1	16.3	7.3	7.2
Socio-economic groups of households						
Employees	5.1	6.2	16.3	15.3	6.9	6.9
Farmers	8.9	11.1	25.9	26.4	12.1	12.2
Working on their own account	2.2	2.6	9.3	7.9	3.3	2.6
Retired	3.9	4.3	13.3	11.9	4.1	3.6
Pensioners	9.6	12.1	25.4	25.8	10.1	10.7
Those who make a living from non-paid sources	22.4	–	41.9	–	27.0	–

Source: GUS 2010a, p. 315.

Seniors are the only social group whose benefits undergo an annual valuation. Thus the results of inflation are alleviated. In Poland, there are no formal circumstances that

<sup>2</sup> **Minimum existence** – defined as extreme poverty, determines the level of fulfilling needs, below which there is a biological life threat and psychophysical human development. The limit of extreme poverty is the minimum level required to live at, as prepared by Instytut Pracy i Spraw Socjalnych for a one-person working household. The limits of poverty are estimated for particular quarters (Rocznik Statystyczny Rzeczypospolitej Polskiej 2012, pp. 281–282).

<sup>3</sup> **Relative poverty** – 50% of the average monthly expenses set at the level of all the households with the consideration of the so-called original equivalence scale OECD. Poverty limits are estimated for particular quarters (ibidem, pp. 281–282).

<sup>4</sup> **Statutory poverty** – is the level at which, according to the current *Social Assistance Act* (consolidated Dz. U. 2008, no. 115, sec. 728, with further changes), people are able to apply for financial benefits from the social assistance system (ibidem, pp. 281–282).

should lead to ageism. Nevertheless, there are areas, in which seniors may be discriminated against as far as age is concerned. The respondents to Eurobarometr (Eurobarometr 76.2,2011) have indicated such areas. Most often, this is the case with the workplace or during the search for work – 18% of indications (15% in EU); concerning healthcare – 15% (11% in EU); concerning access to financial products and services – 10% (10% in EU). In this case, Polish seniors are in a worse situation than their peers in the EU. Senior discrimination in the labor market appears in various forms and may include the refusal to give employment due to age and not qualifications, refusal to promote senior workers, refusal to invest in training, discrediting competences, or firing workers right after they reach retirement age. In the sphere of healthcare, discrimination is felt by seniors especially strongly. According to P. Szukalski (2012, pp. 162–165), ageism in healthcare takes the form of “actions” and “neglects”. “Actions” are a problem of the low financing of healthcare services for seniors, who due to sickness demand longer, more complex and more expensive treatment. The category of wrong “actions” includes the existence of the non-formal age border which prevents seniors from accessing innovative therapies and pharmacological treatments, and also by making access to prostheses and physiotherapeutic treatment and equipment more difficult. Among the “neglects”, the most harmful seems to be the lack of a geriatric healthcare system. Poland is one of the countries with the lowest access to geriatric care; it is estimated that there are only 150–200 geriatricians (Bień 2013, p. 126). Ageist behavior in the area of financial products and services include the refusal to grant a loan or other product offered by banks (e.g. credit cards), and dishonest, unfavorable sales strategies directed towards seniors (Osoby starsze na rynku usług finansowych, 2013).

### **The health situation of seniors in Poland**

One of the most important factors that determine good ageing is the state of health. Old age is not treated as an illness, but ageing brings with it an increased probability of attack by disease and a loss of overall efficiency. The natural process, as far as prolonging life is concerned, is a decrease in mental and physical health, although the dynamics of the process of the decrease in body function vary and depend on many factors. There is no doubt that the increase in survivability is a result of an improvement in living conditions, the progress of civilization, the use of better medical technologies, and better diagnosis of disease; however, this does not equate to the maintenance of good health in advanced old age.

An objective determination of senior healthcare is very difficult because of the natural process of limitation of body functions, which overlaps with the results of disability and sickness. Thus, in research on health care, a subjective evaluation of health is expressed by those concerned. Most often, the health evaluation declared by those examined, is described in categories from very good to very bad. This categorization was applied in the research on people’s health conducted by GUS in 2009 (GUS 2011), according to which age is a significant factor of how seniors evaluate their health (60 years

of age and more). Only a small percentage of seniors were satisfied with the state of their health (in the categories of very good and good) and this decreased significantly in further age groups. The subjective evaluation of health status is presented in Table 9.

**Table 9. Subjective evaluation of health status**

Age	State of health evaluation				
	Very good	Good	Average, could be better, could be worse	Bad	Very bad
	percentage				
Overall	23.6	42.1	23.4	8.82	2.0
15–19	48.9	42.0	7.9	1.0	0.1
20–29	41.1	49.3	7.9	1.4	0.1
30–39	26.3	57.6	13.6	2.3	0.3
40–49	11.9	52.5	28.5	6.1	0.9
50–59	5.7	39.2	39.6	12.9	2.4
60–69	3.1	25.2	47.5	19.5	4.8
70–79	1.2	13.8	45.6	31.1	8.2
80 and more	0.5	13.1	36.6	36.9	13.0

Source: GUS 2011, p. 108.

The data gathered in this research document the occurrence of the phenomenon of sickness. As people age, the number of diseases that they face increases – which, along with the biological results of ageing and the consequences of illnesses – cause the quality of life to decrease significantly. The data is presented in Table 10.

**Table 10. Average number of chronic diseases per 1 person according to age**

Age	Overall	Men	Women
	Per 1 person		
Overall	1.5	1.2	1.7
15–19	0.4	0.3	0.4
20–29	0.4	0.4	0.4
30–39	0.7	0.6	0.7
40–49	1.2	1.0	1.3

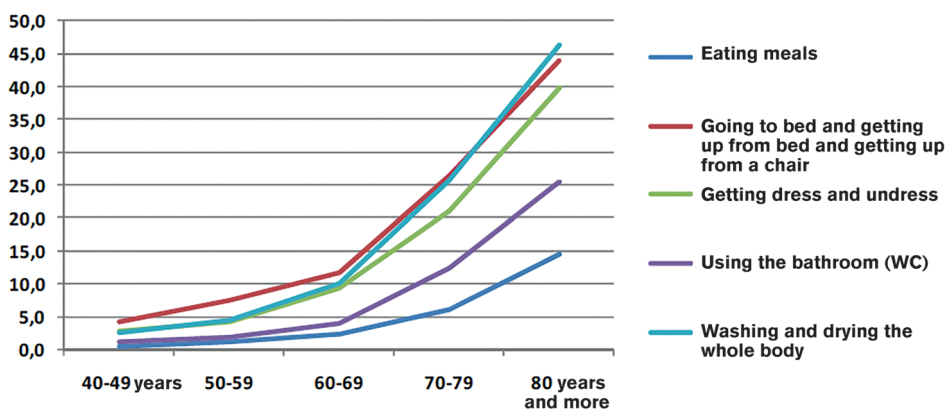
Age	Overall	Men	Women
	Per 1 person		
50–59	2.0	1.7	2.2
60–69	2.8	2.4	3.1
70–79	3.5	3.2	3.7
80 and over	3.7	3.4	3.8

Source: GUS 2011, p. 48.

Research by GUS also indicates that difficulties in performing house work deriving from the state of one's health are declared by every third 60-year old, over 60% of the 70-year-old population, and nearly 85% of the oldest people.

The health deficit in the subjective evaluation of seniors occurs in many pieces of research, both at a national and local level (GUS 2012c), where among many aspects of life the worst evaluation was given to the satisfaction with one's own state of health. The decrease in the level of health among seniors is a serious threat to their autonomy, since it is harder for them to take part in their family, social, and religious life and in the local community. Seniors become more and more dependent on help from others. One way to improve their physical condition is to include seniors in the trends of various activities, which will allow them to prolong their good health until late old age.

The increasing number of older people and the ever extending average life expectancy have caused an inevitable increase in the number of disabled people. According to the National Census from 2011 (GUS 2012h, p. 63), the number of disabled people equaled 4697.5 thousand, which was 12.2% of population. This number is considered to



Graph 4. Frequency of the occurrence of difficulties in self-service (percentage)

Source: GUS 2011, p. 52.

be an underestimate, since according to NSP 2002 (GUS 2003, p.36) it equaled 5456.7 thousand disabled people, which was 14.3% of the population.

Therefore, the available data vary in the case of the population of disabled people according to age. Thus the most up-to-date data belong to GUS which performed a survey regarding the state of health of Poland's population in 2009, and which they published in 2011 (GUS 2011, p. 154). In order to evaluate the level of disability among the population, the criteria were used of having a legal disability certificate and/or having a severely limited ability to perform actions. The results are shown in Table 11.

**Table 11. Disabled people according to age**

Age	Disabled in %				Healthy
	Overall	Legally and biologically	Only legally	Only biologically	
Overall	13.9	4.1	8.9	2.9	86.1
60–69	31.0	8.5	16.1	6.4	69.0
70–79	41.6	13.7	16.1	11.8	58.4
80 and more	52.3	16.5	12.3	23.5	47.7

Source: GUS 2011, p. 248.

Diseases and disabilities, apart from leading to a limitation in function, are also connected with economic issues. It should be remembered that health expenditure (the purchase of medication, diet supplementation, devices, rehabilitation equipment, and doctor's visits) for seniors are the highest of all socio-economic groups. Moreover, the efficiency and independence that decrease with age force seniors to use paid help.

### **Helping disabled seniors**

The ageing of societies and changes to the modern family have led to a growing risk of dependency and the multiplication of problems connected with caring for disabled people in their senior age (*long term care*). Dependency should be treated as the inability to lead an independent existence, resulting in the necessity of steady and long-term care and help from other people in handling every-day activities: nutrition, moving, and supplying the household. Dependency may derive from senior disability (physiological dependency) and diseases or organism damage (pathological dependency). Longer life is inevitably connected with deteriorating physical and mental health. The European Committee states that among people over 65 years of age, 5% is fully dependent and 15% is partially dependent on long-term care. At the age of 75 and over, a higher level of care is required by 10% , and partial long-term care by 25%. In most countries, the ratio of seniors in long-term care to

people from other social groups is 80:20 (Beck, Kędziora-Kornatowska 2013, pp.56–60). According to the World Health Organization, long term care is a system of actions taken by non-formal care takers (family, friends, neighbors) and/or professionals (medical, social, other), in order to provide a person that is unable to handle every-day tasks with the highest possible quality of life in accordance with personal preferences, requirements, and personal dignity (Father, after: Jurek, 2007). Looking at PolSenior, it may be stated that the tendency of needing help increases with age, which is documented in Table 12.

**Table 12. Respondents according to age and frequency of need for help**

Age	Constantly	A few times a day	Once a day	A few times a week	Once a week	Less than once a week
55–59	27.7	12.8	4.3	17.0	17.0	21.3
65–69	37.4	15.2	9.1	10.1	8.1	20.2
70–74	29.4	22.1	6.7	19.6	11.7	10.4
75–79	43.7	16.2	7.4	14.8	8.7	9.2
80–84	41.2	18.7	10.4	16.3	8.6	4.7
85–89	51.0	18.2	11.6	11.6	4.7	3.0
90 and more	59.4	22.6	5.7	8.4	2.5	1.3
Overall	47.7	19.4	8.5	12.7	6.3	5.5

Source: Błądowski, electronic doc. doc.

According to international suggestions (ONZ, Council of Europe), the senior support system should be based on the fundamental principle of keeping these people for as long as possible in their particular local environment with a simultaneous gradual increase of services and help with all due respect to the choices of the people concerned. This is about keeping the same environment in terms both of space and of the social aspect. The transfer of seniors to an institutional care causes a break with relationships with neighbors and friends and damages social cohesion – so important in every phase of life and especially important in old age. The disintegration of the family, the way in which young people chase their careers, and the need for constant education have all led to the fact that less time is devoted to the oldest members of the family. The solitude experienced by seniors which then results comes from this large intergenerational cultural difference, and forces them to establish and maintain a close relationship with their dwelling place, in which relationships that last tens of years have led to friendship – and what is more important – mutual support. It is problematic that care givers are often not able to provide proper care to senior members of the house. The factors that determine the difficulties in giving such care may

include: the high level of helplessness of the older person, the advanced age of the care giver who is also often sick, the professional work of the care giver, the quality of family relationships, the financial resources of the care giver and the senior, the limited ability to guarantee proper medication, rehabilitation equipment and the purchase of services performed by professionals at home, a lack of a web of support. Thus, this important role is fulfilled by social services addressed to seniors. They should include help in handling every-day activities (grocery shopping, cleaning, cooking or providing meals, co-financing caring for the sick person at home in accordance with a doctor's recommendations), and improvement treatments (gymnastics, courses in use of orthopedic equipment). In terms of helping helpless seniors in Poland, the tasks and activities are divided among the social care and social medical care systems and they are connected with services performed both at the home of the senior and at an institution, as illustrated in Table 13.

**Table 13. Tasks for health care and social assistance in the area of care of seniors**

	Health care system	Social assistance system
Legal Act	Regulation by the Minister of Health concerning guaranteed benefits in the matter of nursing in the matter of long-term care Dz. U. (Journal of Laws) 2013, sec. 1480	Social Assistance Dz.U (Journal of Laws). (Journal of Laws) 2013, sec. 182 with further changes (UoPS)
Type of benefits	Home care Work care	Home care Work care Financial aid
Criterion of accessibility	0–40 points on Barthel scale	Subject criterion (art. 5 UoPS) Criterion of difficult situation (art. 2, sec. 2, art 7 UoPS) Financial criterion in case of financial benefits (art. 8 sec. 1)
Stationary care	Health Care Center (ZOL), Health Care Center (ZPO)	Nurturing home (DPS) for: <ul style="list-style-type: none"> <li>• people of old age</li> <li>• People chronically sick</li> <li>• People with chronic mental disease</li> <li>• Disabled adults</li> <li>• Intellectually-challenged children and youth</li> <li>• People physically disabled</li> </ul>
Fee for stay at the stationary facilities	Patient up to 70% of income, then the facility	Resident up to 70% of income, then family, or county

Source: Błędowski, Maciejasz 2013, p. 65.

The increasing number of seniors, especially the oldest group, has generated a growing need for long-term care. The costs of such care have accelerated drastically. Public expenses for long-term care in 2005–2012, according to National Health Fund, equaled 515,950 PLN, whereas in 2012 they grew threefold and equaled 1,636,626 PLN (the Ministry of Health 2012, p. 5).

## Senior free time

Seniors that are professionally inactive have a lot of free time to dispose of. The problem of free time management is a subject of interest for both seniors themselves and the surrounding community. Free time may be treated as a space to develop hobbies, searching for new forms of activity, but also as forced inactivity. A significant obstacle in the rational spending of free time is the low mobility of seniors. According to research by PolSenior (Niezabitowska 2013, p. 110), seniors are not very mobile and the main place where they spend their lives is their apartment and its immediate surroundings. Only about 30% of people declared that they spend over 4 years outside the home. This was the case for people who were either professionally active or had other family obligations. Almost 5% did not leave home, and 8% did so for around 30 minutes per day. The remainder, namely over 50% of the surveyed, left their apartments for about 1–3 hours per day. Although the Opinion of The European Economic and Social Committee concerning the contribution of seniors to social life, indicates that “statistical data referring to seniors should be interpreted very carefully and statements that the state of health, indicators of participation etc. are the same in case of people who are 65–100 should be avoided, since there are various needs and possibilities” (dz. U. E. [Journal of Laws] 2013/C 11/04). Free time management is also determined by a range of other factors such as health, material status, education level, attractiveness of activities, habits concerning spending free time, and many more.

Senior free time activity may come in various forms. The typology of activities presented by M. Halicka and J. Halicki includes 5 different types of activities:

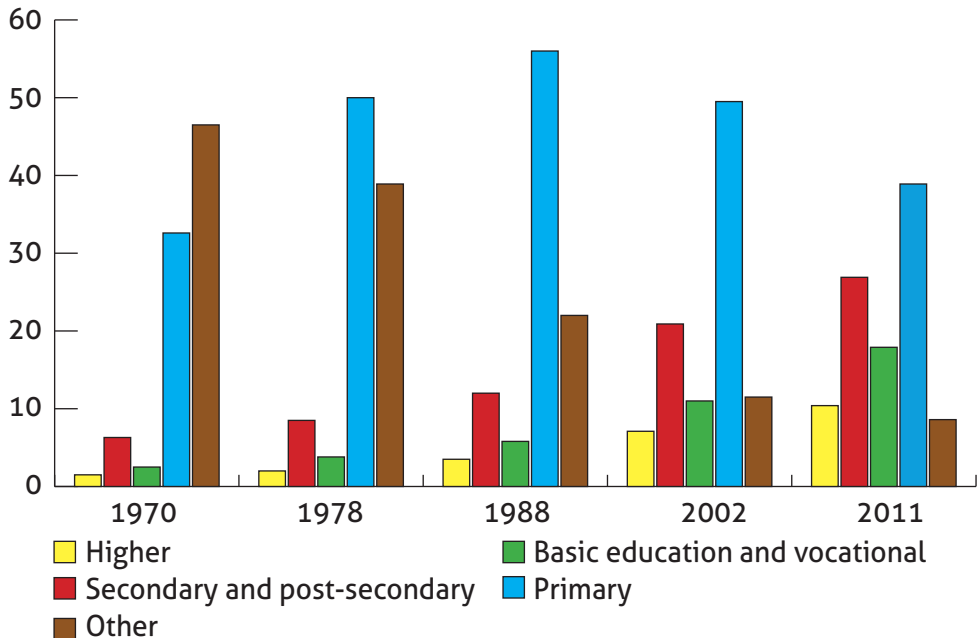
- Recreational-hobby (strolls, sports, gardening, hobby, going to the cinema or to concerts)
- Receptive, characterized by watching TV, listening to the radio, reading books and the press – often connected with staying at home.
- Public-oriented (social, political, and religious work)
- Integration (social and science-training meetings and services, charity)
- Other types of activities, which do not meet the criteria of the previous types (Halicka, Halicki 2002, p. 207).

Many articles of research repeat the same schemata of the ways seniors spend their free time. According to research by CBOS (CBOS, 2012) passive forms of spending free

time dominate: watching TV (98%), listening to the radio (81%), reading books and the press (80%). A very common activity is helping the family e.g. looking after family members (44%), and housekeeping (34%). Social life both at home (87%) and outside (76%), and attending church (81%), are also popular. Seniors are not very involved in educational activity. Only a few seniors educate themselves by developing their knowledge (8%), attending courses (6%) or learning foreign languages (6%). According to research by the EU, the participation of people between 55–74 years of age in formal and non-formal education in Poland is significantly lower than in the EU (In Poland 0.6%, in the EU 3.5%) (Monitor Polski 2012, p. 642). In the context of lifelong learning, the data indicate that encouraging seniors to be active should be a priority among the actions that are targeted at this group of society. Lifelong learning should become available to all.

The various forms of activity undertaken by seniors in order to fill their free time depend greatly on their level of education. An analysis of the senior population concerning their level of education indicates that it is relatively low. However, this situation will change rapidly. The generation of *baby boomers* that is just entering retirement is more educated, and within the next few decades will replace the previous generations that were less educated. The changes in educational level are depicted in Graph 5.

Despite the increasing level of education among seniors, the problem remains of the ability to use modern information communication technologies. Seniors first came



Graph 5. Educational level of people who are 60 and over in 1970–2011

Source: self-study on the basis of GUS year-book.

across these technologies in old age and the vast majority cannot use a computer and does not use the internet.

According to research conducted every two years by Social Monitoring Board (Czapiński, Panek 2007, 2009, 2011), the percentage of seniors who used personal computers within the last four years (in comparison with research from 2007–2011) increased by 6.4%. The oldest part of society is therefore the smallest group in the information space (table 14).

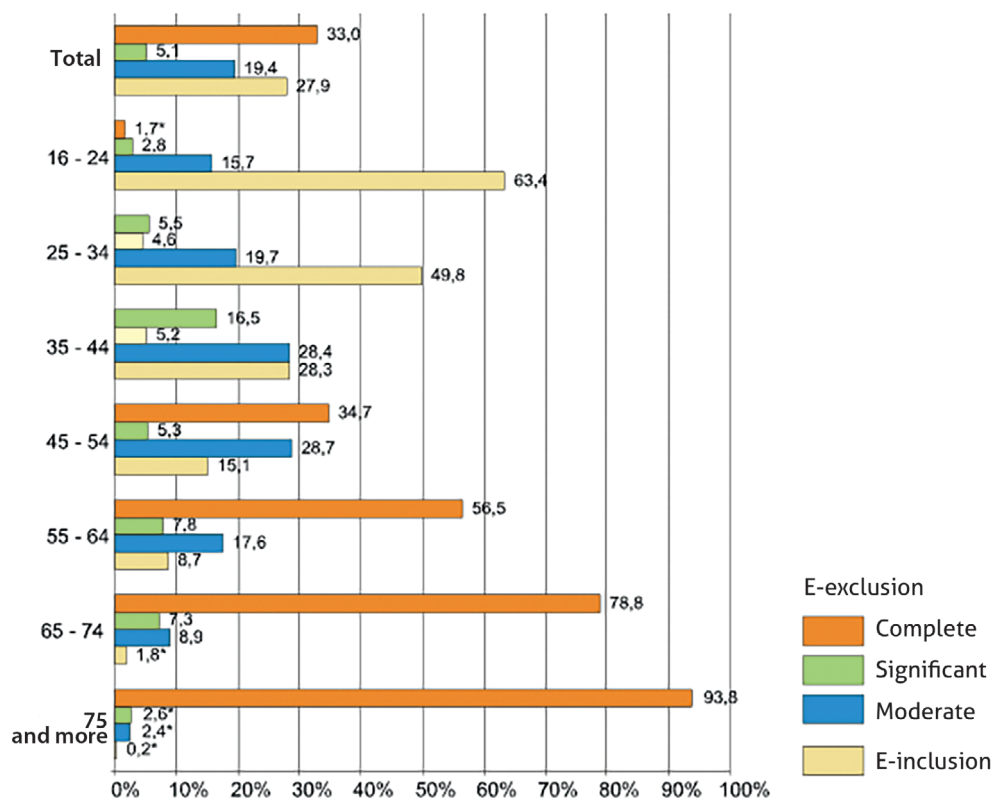
**Table 14. Use of digital information communication technologies according to age group (percentage)**

Age	Computer			Internet			Mobile phone			Not-using			Using three new technologies		
	2007	2009	2011	2007	2009	2011	2007	2009	2011	2007	2009	2011	2007	2009	2011
16–24	88	90.2	93.2	77	86.8	93.1	94	96.1	97.2	2	1.0	0.5	73	80.8	86.6
25–34	72	79.8	86.4	59	73.7	85.9	93	96.8	97.8	5	1.8	1.4	58	69.2	81.1
35–44	57	67.7	75.8	46	62.1	75.7	82	91.4	96.4	14	5.3	2.5	43	57.2	70.0
54–59	40	43.5	50.8	32	39.5	49.9	64	78.2	86.2	30	19.1	11.1	27	34.6	43.9
60–64	18	23.6	30.3	14	20.6	29.2	47	63.4	76.0	49	35.1	22.2	12	17.8	25.2
65 and over	5	7.5	11.4	4	5.8	10.6	22	35.7	48.7	77	66.2	50.1	3	4.6	8.9

Source: Czapiński, Panek 2007, 2009, 2011.

The cyber-exclusion of seniors is documented in the latest research by GUS (GUS 2013c, p.91). According to this research, this phenomenon increases with age. The complete exclusion affects people who have never used a computer and among seniors who were 65–74 years of age this was the case for nearly 79%, and among seniors who were over 75 the figure stood at 94%. Seniors who live in the country are in a much more difficult situation since their access to the internet is limited. At the same time, e-inclusion, defined not only as access to the internet and a computer, but also a self-evaluation of computer and internet use skills, accounted for only 1.8% of people between 65 and 74 years of age and 0.2% of people over 75 years of age.

The forms of senior free time management depend greatly on their intellectual and physical skills. Thus it is important to present seniors with the right propositions that consider their expectations, motivation, and abilities.



Graph 6. Occurrence of e-exclusion and e-inclusion among people at the age of 16 and over (percentage)

Source: GUS 2013c, p. 91.

## The place of old people in society

Research conducted at various times in Poland have proved that the family is still of the most important value for seniors, since it provides support and care. This is confirmed by social survey (CBOS 2010, p.15) which indicates that older people are most satisfied with their family life – especially with their children (91%). Due to societal changes, the family image has undergone significant transformations. The escalation of the phenomenon of the one-person household, the low birth rate, weaker family bonds (mental changes), the relocation of family members (inside and outside migrations) have had the result that older people will be less able to count on their family members. This has raised certain problems, especially with care, which will transfer to institutional forms and non-formal support provided by neighbors and friends. This has been documented by various items of research (Synak 2002; Halik 2002; GUS 2011), according to which the first place is taken by family care, and then support by a small group of people who give

seniors a sense of safety. The small number of people who support seniors are a result of many factors. Without doubt, one is the gradual limitation of mobility which effectively reduces the senior's ability to move beyond their dwelling place. Old friendships from work or other forms of activity present in earlier phases of life become less meaningful. The natural process of peer deaths is also very influential.

A separate problem which affects seniors in society is the appearance of tensions between the young and old generations. The area of conflict is mainly within the labor market (old workers hold places destined for the young) and the issue of pensions. The genesis of the antagonism in the area of employment derives from the delusional belief of the younger generation that the source of their unemployment is the extended employment life of seniors. They think that when a senior steps down from the labor market, it automatically makes room for younger people. Moreover, the younger generation often expresses harmful opinions about the abilities of older workers. Also, controversy concerning the retirement system divides the generations. The distribution system is based on intergenerational solidarity and is seen as unfair for making seniors become rich at the cost of the younger generation. An extreme example of such an attitude is *Raport Instytutu Sobieskiego (Sobieski Institute Report)* (Dobrowolski 2006), although these opinions are not common.

According to a public opinion survey (CBOS 2007), in 2000–2007, there was an improvement in attitude towards older people on the streets and in trade facilities; however, there was still a negative attitude towards seniors in health service facilities and mass communication. Also, the attitude of young people was considered very critical.

Intergenerational relations are influenced by the image of older people in the media. The results of a survey in the framework of the *Wizerunek osób starszych w mediach (Senior image in media)* project (Fundacja na rzecz Kobiet JA KOBIEȚA 2007) indicate the dominantly negative image of old people and the unfavorable choices and ways to present topics connected with seniors (poverty, violence, diseases, pension takers). According to the surveyed, the image of seniors in the media is considered unfair, false and harmful. Poland, which is graying inevitably, requires the acceptance of seniors and the elimination of every form of discrimination. These areas of intergenerational relationships can be improved by changing the way of thinking and perception of old age. The most important thing is to make the young generation realize that the ageing process is an inevitability for each and every human being. In order for old age to be as harmless as possible, the younger generation should take care of their health and should also take care of their financial security for old age.

The chance to improve intra and intergenerational relations may require the greater involvement of seniors in social life. According to the EU, one of the dimensions of active ageing is the matter of participation of seniors in social life. Such activity may have a formalized or non-formalized character, of which the best example is voluntary work. This form of activity is being especially promoted by the EU, which declared 2011 to be the year of voluntary work. In Poland, the principles of voluntary work are regulated by

law (Dz. U.[Journal of Laws] 2010 no 234, pos. 1536); however, this is not a very popular form of senior activity.

More often, older people become more involved in their family/friends environments. Due to the fact that surveys concerning voluntary work and non-formal social involvement are conducted by various institutions (e.g. CBOS, Klon/Jawor Association) and in the framework of programs (e.g. Diagnoza Społeczna, SHARE project) and according to standards, there is no reliable information about the level and specifics of this form of activity. However, regardless of the differences in the surveys, the level of senior activity in this area is low. For instance, a survey conducted by Klon/Jawor Association confirm that people who are under 55 years of age, retired and pensioners, are the groups least willing to do voluntary work (volunteers at the age of 55 and over account for 10% overall, the percentage of retired and pensioners equals 7%, and the overall percentage of adult Polish people involved in voluntary work is 16%) (Przewłocka 2011). According to a survey by Eurobarometr (Eurobarometr 76.2, 2011), respondents declared actively working for charity organizations and others devoted to voluntary work (12%, whereas the EU average is 27%). According to a survey by GUS, 19.6% of seniors were involved in work for organizations, most often (11%) churches, communities, religious organizations or the facilities that manage them (GUS 2012c). However, it is hard to estimate whether it is senior activity for the sake of other seniors or it is of an intergenerational character.

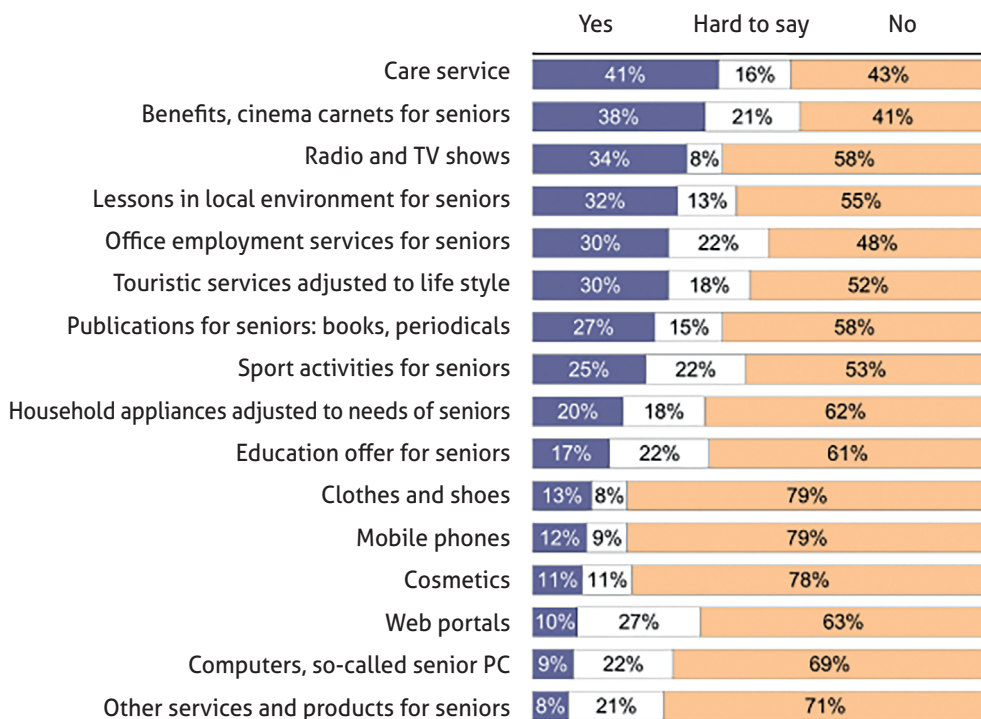
When describing the general living conditions of older people in Poland, it should be highlighted that despite the problems that currently exist, these people do not have high expectations and are satisfied with life. The only areas that are evaluated in a negative way are their state of health and their financial situation, which is documented in Table 15.

**Table 15. Opinion of seniors on satisfaction with various aspects of life**

Satisfaction	Satisfaction level in % of people at the age of 65 and over	
	Yes	No
With family situation	66.3	14.3
With relation with other people, including friends	77.4	4.8
With financial situation (including income)	31.8	38.5
With material life conditions (except income)	52.5	19.1
With free time amount	82.9	5.0
With ways to spend free time	65.0	10.2
With health	23.5	47.5

Source: GUS 2012c, p. 14.

According to a survey by CBOS concerning the deficiency of services and products dedicated to seniors, the most serious problem is a lack of care services. The most prominent place in the category of shortages is filled by various services and products connected with free time management. A large percentage of negative answers may indicate that seniors limited their needs to the most basic and did not expect anything else from life. The answers are presented in Graph 7.



**Graph 7. Lack of services and products dedicated to seniors according to the opinions of the respondents**

Source: Message from CBOS research, 2009, p. 15.

## Social policy for the benefit of seniors

The tasks concerning the support and improvement of life in old age are determined by the social policy applied by the government. The realization of its directives is a task mainly for various local institutions, although a progressively greater role is being taken by non-government organizations. Their role, however, is limited to supporting public administration organizations (government and self-government).

Currently, pressure is being put on the basic issues concerning the conditions and quality of life of seniors, namely: pension system threats, the position of older people in

the labor market, health aspects and access to health care, the functioning of a senior care system, the prevention of pathologies that affect seniors (violence, harmful treatment in care facilities), and changing the image of seniors in society.

A growing interest in the problem of old age has led to many publications in Poland, edited by science institutions, the government, and parliament, which are a review of the key issues connected with demographic changes<sup>5</sup>

Before joining the European Union, issues connected with seniors were of marginal importance in Poland. Political documents that have been created recently concentrate much more on the problems of old age or refer only to this matter. This is often the result of initiatives undertaken at the EU level. The problem of old age is touched upon in:

1. **National Development Strategy 2007–2015** (The Ministry of Regional Development [MRR], 2006) – which proclaims an increase of access to social services, the development of life-long education, participation in culture and tourism, the idea of belong to a stimulating and integrative local community, and activity within civil society. These postulates apply to all citizens including old people.
2. **Citizen society development strategy 2009–2015** (the Ministry of Labor and Social Policy 2008). Aims at shaping the process of citizen societal development. program Ideas in common with other programs: the creation of infrastructure for local citizen activity, social education, and involving society in public issues. Providing access to social services to the excluded and those in threat of exclusion (including seniors), and providing a system of mechanisms of complex social integration support etc.<sup>9+</sup>
3. **Social Policy Strategy 2007–2013** (the Ministry of Social Policy, 2005) – which covers complex issues regarding the function of old people. These areas involve fostering the development of different forms of activity such as life-long education, using the potential of seniors in the local community, volunteering, self-organization and participation in social life, culture and leisure, and self-assistance activities. The document emphasises shaping inter-generational relations, increasing access to care

<sup>5</sup> The result of the I Demographic Congress in 2002 was publishing 21 volumes concerning the problems of population ageing. Polish Academy of Science (PAN) published two books: *Polska w obliczu starzenia się społeczeństwa* (PAN 2008) i *Konsekwencje starzenia się społeczeństwa* (Kleer 2008). Polish Population Council published a set of research *O sytuacji ludzi w starszym wieku* (Hrynkiewicz 2012), which is an outcome of the II Demographic Congress.

Bureau of Research Chancellery of the Sejm published a volume of BAS Study *Starzenie się społeczeństwa polskiego* (Ciura, Zgliszczyński 2012). RPO inspired two publications: *Stan przestrzegania praw osób starszych w Polsce. Analiza i rekomendacje działań* (Szatur-Jaworska 2008). And *Strategie działania w starzejącym się społeczeństwie* (Szatur-Jaworska 2012). An important position is the presentation of nationwide research by PolSenior *Aspekty medyczne, psychologiczne, socjologiczne i ekonomiczne starzenia się ludzi w Polsce* Mossakowska, Więcek, Błedowski 2012). Significant is also the 2013 White Book *Zdrowe starzenie się* (Raciborski, Samoliński 2013), prepared by a group of experts in the frame of Koalicja na Rzecz Zdrowego Starzenia się (coalition for healthy ageing). A great number of scientific books were also published in various academic institutions concerning various aspects of ageing.

services, and the participation of NGOs in the operation of programs addressed to senior citizens.

4. **Life-long Learning Perspective document** (The Ministry of National Education, 2011) stresses the importance of learning in various forms, places, and periods in life. The most important aspect of this document is the emphasis it places on the necessity of senior education so they can sustain their professional and social activity and remain independent in their personal life. Senior education has not been so far included in educational and social policy priorities.
5. **Solidarity between generations. Activity for the purpose of increasing professional activity of people over 50. Actions for increasing professional activity of people over 50** (Council of Ministers 2008) along with *Implementation Document (2012)* – these are a set of actions that aim at the realization of the main goal, which is to reach the employment indicator for people between 55–64 of 50% by the year 2020. It is directed mainly to a few age groups (over 45, 50, 55 and more). The most important aspect of the program is the intergenerational approach it takes since the actions refer to the promotion of access to unemployment for the whole time of participation in the labor market.
6. **The Foundations of Long-term Senior Policy in Poland 2014–2020 (MPiPS)**, which are a realization of the obligation to prepare a long-term senior policy deriving from the *The Government Program for Senior Citizens Social Activity for the years 2012–2013 (ASOS)*. Currently, *The Foundations of Long-Term Senior Policy in Poland 2014–2020 (ZDPS)* has been presented for social discussion. Senior policy is treated in this document as a range of actions during one's lifetime which lead to the provision of conditions to prolong activity – both professional and social and to the independent, healthy, and safe life of seniors.
7. **The Government Program for Senior Citizens Social Activity for the years 2012–2013 (M.P. 2012 no 0 item 642)** aims at improving the quality of life for older people through social activity and the opportunity to fulfill various social roles in public life. It is emphasized that the limitations resulting from functional barriers should not hinder social activity. The program includes an internal differentiation within the population of seniors and also promotes activities towards people with limited independence.
8. **Foundations of the Polish Population Policy (RRL, 2013)** – so far as a project drafted by the Government Population Council. One of the project's areas is to create conditions to facilitate integration within the ageing society that includes the participation of old people in various disciplines of social life, poverty prevention, access to health and care services, and the elimination of discrimination.
9. **National Senior Social Activity Program for 2012–2013 (M.P. 2012)** – aims at the improvement of the quality of life for seniors through their involvement in social activity and their ability to fulfill various social roles in public life. It is underlined that

the occurrence of many limitations that derive from functional barriers should not confine social involvement. The program includes the internal differences within the senior population and promotes actions dedicated to seniors whose independence is limited. It is also the first national program of such range and is dedicated to seniors and intergenerational co-operation.

The addressees of the postulates included in the above-mentioned documents are organs of national and local administration, social organizations, local communities, the media and institutions which realize tasks and initiatives that shape the conditions for the dignified and healthy ageing of society. Addressees are also seniors, since their involvement in solving their own problems is a very important matter. As J. Starega-Piasek underlines, “seniors should be guardians of their values, which have shaped the surrounding world themselves and should not resign from them under the pressure of youth [...] Seniors should be open to changes in many areas – technological, cultural, educational, aesthetic [...]. The fulfillment of these assumptions is, however, very difficult, since the mechanisms connected with the ageing process such as the apotheosis of the past and adaptation to the new and changes that comes grows harder with age. Nevertheless, without being open to the new, seniors will be condemned to marginalization.” (Starega, Piasek 2006, p. 135).

## Conclusion

The ageing of societies is one of the most serious challenges of modern times. This problem is becoming more and more the case in Poland. It is necessary to undertake actions in the social, cultural, economic, and political spheres that will alleviate the negative consequences of the process.

It seems that issues connected with ageing and becoming old are well known; however, the variety of these issues should encourage one to extend one's knowledge, and should also be an inspiration to discover new issues related to the matter. Without doubt, it is also a result of the slow but systematic change in the perception of seniors. Not so long ago, they were considered passive people, who after retirement, stepped down from social life, concentrated on their own issues and withdrew from their social roles. In a wider understanding, seniors are treated as a load for the young generation to bear, since they generate growing expenses for the health and pension services. This attitude has slowly been changing.

The necessity for a new attitude towards the problem of population ageing becomes a challenge for the creation of solutions for Polish society to function better in the future and to be friendlier to all population groups. A condition for the successful development of the changing demographic situation is a holistic approach to seniors, defining the difficulties which they face, but also to use their potential.

Thus, when considering the most important problems and challenges faced by the actors of life, the following issues should be indicated:

1. The pension system is under threat. The replacement of a salary with a pension will be of a lower value than currently, which may lead to the impoverishment of pensioners.
2. The decrease in the material level of seniors will influence the level of consumption of goods and services (including education) by seniors.
3. The extension of human capital is necessary, since by moving the age of retirement to 67, there will be a permanent need to increase and gain new qualifications or to change qualifications in order to remain in the labor market.
4. The exhaustion of the potential of family care will demand the extension of forms of institutional work. Thus, more qualified people should be trained in order to work with this social group.
5. A serious challenge is the need to increase the human capital of seniors in light of their low involvement in social activity.
6. It is necessary to activate seniors in terms of self-help activities, and to prevent their isolation. It is recommended that the ways in which seniors may spend their time be extended, especially in their local environment, and also the promotion of voluntary work. The Announcement by the European Committee that 2011 will be the year of Voluntary Work did not give Poland a noticeable push in the case of any growth in senior activity.
7. In order to eliminate every form of discrimination and reinforce the seniors' position, more attention should be paid to education about old age dedicated to the whole of society.
8. Public administration organs should be obliged to offer equal access to institutional resources, the proper choice of intervention, and the provision of access to long-term care.

## Bibliography

- BECKO., KĘDZIORA-KORNATOWSKA K., 2013, *Spoleczne ubezpieczenie pielęgnacyjne jako szansa rozwiązania problemu opieki nad osobami starszymi w Polsce*, „Nowiny Lekarskie”, 82, 1.
- BIEŃ B., 2013, *Geriatrya – jej cele i problemy w Polsce*, [w:] B. Samoliński, F. Raciborski, (red.), *Zdrowe starzenie się: Biała Księga*, Wydawnictwo Naukowe Scholar, Warszawa.
- BŁĘDOWSKI P., MACIEJASZ M., 2013, *Rozwój opieki długoterminowej w Polsce – stan i rekomendacje*, „Nowiny Lekarskie”, 82,1.

- BOMBOL M., SŁABY T., 2011, *Konsument 55+ wyzwaniem dla rynku*, Warszawa *Budżety gospodarstw domowych w 2011 r.*, 2012, Główny Urząd Statystyczny, Warszawa.
- CIURA G. I ZGLISZCZYŃSKI W. (red.), 2012, *Starzenie się społeczeństwa polskiego*, Biuro Analiz Sejmowych Kancelarii Sejmu, Studia BAS nr 2, Warszawa.
- CZAPLIŃSKI J., PANEK T. (red.), 2007, *Diagnoza Społeczna. Warunki i jakość życia Polaków*, Rada Monitoringu Społecznego, Warszawa.
- CZAPLIŃSKI J., PANEK T. (red.), 2009, *Diagnoza Społeczna. Warunki i jakość życia Polaków*, Rada Monitoringu Społecznego, Warszawa.
- CZAPLIŃSKI J., PANEK T. (red.), 2011, *Diagnoza Społeczna. Warunki i jakość życia Polaków*, Rada Monitoringu Społecznego, Warszawa.
- DOBROWOLSKI P., 2006, *Starsi Polacy żyją na koszt młodszych Polaków - zarys zjawiska*. Raport Instytutu Sobieskiego „Kto płaci za starzenie się społeczeństwa i marnotrawstwo PRL”, nr 21.
- Emerytury i renty w 2011 r.*, 2012, Główny Urząd Statystyczny, Warszawa.
- EUROPA 2020. *Strategia na rzecz inteligentnego i zrównoważonego rozwoju sprzyjającego włączeniu społecznemu*.
- FATHER M., 2002, *Cultural change in long-term care facilities: changing facility or changing the system*, [w:] A. S. Weiner, J. L. Ronch (red.), *Cultural change in long-term care*, Haworth Press, New York.
- FRĄCKIEWICZ L., WACHELKO-ŻAKOWSKA B., 1987, *300 wiadomości o starości*, Śląski Instytut Naukowy, Katowice.
- Halicka M., Halicki J. (red.), 2006, *Zostawić ślad na ziemi*, Wydawnictwo Uniwersytetu w Białymstoku, Białystok.
- HALICKA M., HALICKI J., 2002, *Integracja społeczna i aktywność ludzi starszych*, [w:] B. Synak (red.), *Polska starość*, Wydawnictwo Uniwersytetu Gdańskiego, Gdańsk.
- HALIK J. (red.), 2002, *Starzy ludzie w Polsce. Społeczne i zdrowotne skutki starzenia się społeczeństwa*, Instytut Spraw Publicznych, Warszawa.
- HRYNKIEWICZ J. (red.), 2012, *O sytuacji ludzi w starszym wieku*, Rządowa Rada Ludnościowa, Warszawa.
- Jak się żyje osobom starszym w Polsce*, 2013, Główny Urząd Statystyczny, Warszawa.
- Jakość życia, kapitał społeczny, ubóstwo i wykluczenie społeczne w Polsce*, 2013, Główny Urząd Statystyczny, Warszawa.
- KLEER J. (red.), *Konsekwencje starzenia się społeczeństwa*, PAN, Warszawa.
- KOMUNIKAT KOMISJI, KOM(2010) 2020, wersja ostateczna.
- KOMUNIKAT Z BADAŃ CBOS, 2012, *Sposoby spędzania czasu na emeryturze*, „BS”, nr 106, Warszawa.
- KOMUNIKAT Z BADAŃ CBOS, 2009, *Sytuacja ludzi starszych w społeczeństwie –plany a rzeczywistość*, „BS”, nr 160, Warszawa.
- KOMUNIKAT Z BADAŃ CBOS, 2010, *Obraz typowego Polaka w starszym wieku*, „BS”, nr 2, Warszawa.

- KOMUNIKAT Z BADAŃ CBOS, 2012, *Polacy wobec własnej starości*, „BS”, nr 94 Warszawa.
- KOMUNIKAT Z BADAŃ CBOS, 2007, *Czy zmienia się stosunek Polaków do starości*, „BS”, nr 33, Warszawa.
- MACIEJEWSKI G., 2003, *Zamożność gospodarstw domowych jako element jakości życia*, [w:] J. Karwowski (red.), *Jakość życia w regionie*, Wydawnictwo Naukowe Uniwersytetu Szczecińskiego, Szczecin.
- NIEZABITOWSKA E., 2012, *Mieszkania dla ludzi starych i młodych w kontekście potrzeb i cyklu życia budynku mieszkalnego*, [w:] M. Zralek (red.), *Przestrzenie starości*, Oficyna Wydawnicza Humanitas, Sosnowiec.
- Osoby starsze na rynku usług finansowych. Analiza i zalecenia*, 2013, Biuletyn RPO. Źródła nr 4, Warszawa.
- POLSENIOR, 2012, *Aspekty medyczne, psychologiczne, socjologiczne i ekonomiczne starzenia się ludzi w Polsce*, [w:] M. Mossakowska, A. Więcek, P. Błędowski (red.), terMedia, Poznań.
- Polska w obliczu starzenia się społeczeństwa. Diagnoza i program działania*, 2008, Polska Akademia Nauk, Warszawa.
- Prognoza ludności na lata 2008-2035*, 2009, Główny Urząd Statystyczny, Warszawa.
- Program solidarności pokoleń. Działalność dla zwiększenia aktywności zawodowej osób w wieku 50+*. *Działania dla zwiększenia aktywności zawodowej osób w wieku 50+*”, 2012, Ministerstwo Pracy i Polityki Społecznej, Warszawa.
- PRZEWŁOCKA J., 2011, *Zaangażowanie społeczne Polaków w roku 2010: Wolontariat, Filantropia, 1%*, Raport z badań, Stowarzyszenie Klon/Jawor, Warszawa.
- Raport z wyników. Narodowy Spis Powszechny Ludności i Mieszkań 2011*, 2012, Główny Urząd Statystyczny, Warszawa.
- Rocznik Statystyczny RP 2013*, 2013, Główny Urząd Statystyczny, Warszawa.
- Rocznik Statystyczny RP*, 2012a, Główny Urząd Statystyczny, Warszawa.
- ROSSET E., 1967, *Ludzie starzy. Studium demograficzne*, PWE, Warszawa.
- SAMOLIŃSKI B., RACIBORSKI F. (red.), 2013, *Zdrowe starzenie się: Biała Księga*, Wydawnictwo Naukowe Scholar, Warszawa.
- Stan faktyczny i perspektywy rozwoju opieki długoterminowej w Polsce*, 2012, Ministerstwo Zdrowia, Warszawa.
- Stan zdrowia ludności Polski w 2009 r.*, 2011, Główny Urząd Statystyczny, Warszawa.
- Strategia Wspierania Rozwoju Społeczeństwa Obywatelskiego na lata 2009–2015*, 2008, Rada Ministrów, Warszawa.
- SYNAK B. (red.), 2002, *Polska starość*, Wydawnictwo Uniwersytetu Gdańskiego, Gdańsk.
- Sytuacja gospodarstw domowych w 2012 r. w świetle wyników badań budżetów gospodarstw domowych*, 2013, Główny Urząd Statystyczny, Warszawa.
- SZAROTA Z., 2004, *Gerontologia społeczna i oświatowa. Zarys problematyki*, Akademia Pedagogiczna, Kraków.

- SZATUR-JAWORSKA B. (red.), 2008, *Stan przestrzegania praw osób starszych w Polsce. Analiza i rekomendacje działań*, „Biuletyn RPO – Materiały”, Zeszyt 65, Warszawa.
- SZATUR-JAWORSKA B. (red.), 2012, *Strategie działania w starzejącym się społeczeństwie. Tezy i rekomendacje*, „Biuletyn RPO – Źródła”, nr 9, Warszawa.
- SZATUR-JAWORSKA B., BŁĘDOWSKI P., DZIĘGIELEWSKA M. (red.), 2006, *Podstawy gerontologii społecznej*, Oficyna Wydawnicza ASPRA-JR, Warszawa.
- SZUKALSKI P., 2012, *Solidarność pokoleń. Dylematy relacji międzypokoleniowych*, Wydawnictwo Uniwersytetu Łódzkiego, Łódź.
- Ubóstwo w Polsce w 2011 r.*, 2012b, Główny Urząd Statystyczny, 2012b, Warszawa.
- Założenia polityki ludnościowej Polski*, 2013, Rządowa Rada Ludnościowa, Warszawa.

### Legal acts

- Dz. U. 2008 nr 237, poz. 1656 z późniejszymi zmianami, *Ustawa z dnia 19 grudnia 2008 r. o emeryturach pomostowych*
- Dz. U. 2009 nr 153, poz. 1227 z późniejszymi zmianami, *Obwieszczenie Marszałka Sejmu Rzeczypospolitej Polskiej z dnia 26 sierpnia 2009 r. w sprawie ogłoszenia jednolitego tekstu ustawy o emeryturach i rentach z Funduszu Ubezpieczeń Społecznych*
- Dz. U. 2010 r. nr 234, poz. 1536 z późniejszymi zmianami, *Obwieszczenie Marszałka Sejmu Rzeczypospolitej Polskiej z dnia 27 października 2010 r. w sprawie ogłoszenia jednolitego tekstu ustawy o działalności pożytku publicznego i o wolontariacie*
- Dz. U. 2013, poz. 182 z późniejszymi zmianami, *Obwieszczenie Marszałka Sejmu Rzeczypospolitej Polskiej z dnia 14 listopada 2012 r. w sprawie ogłoszenia jednolitego tekstu ustawy o pomocy społecznej*
- Dz. U. E. 2013/C 11/04, *Opinia Europejskiego Komitetu Ekonomiczno-Społecznego w sprawie wkładu osób starszych w życie społeczne i ich udziału w nim*,
- Dz. U., 2013, poz. 1480, *Rozporządzenie Ministra Zdrowia w sprawie świadczeń gwarantowanych z zakresu świadczeń pielęgnacyjnych i opiekuńczych w ramach opieki długoterminowej*,
- M.P. 2012, poz. 642, *Uchwała Nr 137 Rady Ministrów z dnia 24 sierpnia 2012 r. w sprawie ustanowienia Rządowego Programu na rzecz Aktywności Społecznej Osób Starszych na lata 2012–2013.*

### Web pages

- BŁĘDOWSKI P., *Opieka długoterminowa w Polsce w świetle najnowszych badań*, pozyskano z: [www.senat.gov.pl/gfx/senat/userfiles/\\_public/k8/agenda/seminaria/2013/130514/prof\\_p-bledowski.pdf](http://www.senat.gov.pl/gfx/senat/userfiles/_public/k8/agenda/seminaria/2013/130514/prof_p-bledowski.pdf)
- Eurobarometr 76.2. Aktywne starzenie się. Wyniki dla Polski*, pozyskano z: [ec.europa.eu/public\\_opinion/archives/ebs/ebs\\_378\\_fact\\_pl\\_pl.pdf](http://ec.europa.eu/public_opinion/archives/ebs/ebs_378_fact_pl_pl.pdf)
- Ministerstwo Edukacji Narodowej, 2011, *Perspektywa uczenia się przez całe życie*, pozyskano z: [bip.men.gov.pl/images/stories/Karolina/plll2011\\_02\\_04.pdf](http://bip.men.gov.pl/images/stories/Karolina/plll2011_02_04.pdf)

- Prognoza wpływów i wydatków funduszu emerytalnego do 2060 roku*, ZUS, Warszawa maj 2013, pozyskano z: [www.zus.pl/bip/pliki/Prognoza\\_fundusz\\_emerytalny\\_2015\\_2060.pdf](http://www.zus.pl/bip/pliki/Prognoza_fundusz_emerytalny_2015_2060.pdf)
- Rządowy program na rzecz aktywności społecznej osób starszych na lata 2014-2020*, pozyskano z: [www.mpips.gov.pl/bip/projekty-aktow-prawnych/projekty-programow-i-inne/rzadowy-program-na-rzecz-aktywnosci-spoecznej-osob-starszych-na-lata-2014-2020-/](http://www.mpips.gov.pl/bip/projekty-aktow-prawnych/projekty-programow-i-inne/rzadowy-program-na-rzecz-aktywnosci-spoecznej-osob-starszych-na-lata-2014-2020-/)
- Strategia Polityki Społecznej na lata 2007-2013*, .Ministerstwo Polityki Społecznej, 2005, pozyskano z: [www.mpips.gov.pl/gfx/mpips/userfiles/File/nowe/strategiaps.pdf](http://www.mpips.gov.pl/gfx/mpips/userfiles/File/nowe/strategiaps.pdf)
- Strategia Rozwoju Kraju 2007 – 2015*, Ministerstwo Rozwoju Regionalnego, 2006, pozyskano z: [www.mrr.gov.pl/rozwoj\\_regionalny/polityka\\_rozwoju/srk/strony/strategia\\_rozwoju\\_kraju\\_2007\\_2015.aspx](http://www.mrr.gov.pl/rozwoj_regionalny/polityka_rozwoju/srk/strony/strategia_rozwoju_kraju_2007_2015.aspx)
- Struktura wysokości emerytur i rent wypłacanych przez ZUS po waloryzacji w marcu 2013 roku*, ZUS Warszawa 2013, pozyskano z: [www.zus.pl/files/Struktura%20wysoko%20emerytur%20i%20rent%20wyp%20acanych%20przez%20ZUS%20po%20waloryzacji%20w%20marcu%202013%20r.pdf](http://www.zus.pl/files/Struktura%20wysoko%20emerytur%20i%20rent%20wyp%20acanych%20przez%20ZUS%20po%20waloryzacji%20w%20marcu%202013%20r.pdf)





Artur Fabiś

# EDUCATING SENIORS, CONDITIONS FOR SENIOR EDUCATION IN POLAND<sup>1</sup>

## Learning in old age – from education practice to the interest in the phenomenon

The groundbreaking moment when a change occurred in the perception of seniors as potential participants of educational processes was probably the establishment of the first university of the third age. This symbolic event in 1973 not only initiated a serious educational movement which led to the greater involvement of the most emancipated seniors in academic education, but also provoked a reflection on the place of seniors in lifelong learning. Since 1975, after the first university of the third age of H. Szwarc, new facilities were founded in order to reflect the biggest growth dynamics within the first ten years of the twenty-first century; these facilities numbered 400 units. Along with practice, Polish scientists were developing scientific awareness concerning the senior learning process, institutions that support such activity, the role of the teacher in shaping seniors, and other conditions relating to the educational activity of seniors. The greatest interest in gerontology in scientific activity by Polish seniors may be observed only in this century and this involvement has been growing constantly.

In 1974, the Polish Gerontology Association was founded – the first association that unites specialists in the matters of sociology, demography, psychology, medicine, and economics. Up until now, the main branches of interest for members of the association have been: medicine, economy, and demography. The association of larger social and humanistic provenance is the Social Gerontology Association, founded in 2011. The SGS's main area of interest is the learning processes of seniors, care for seniors, and their support. Both associations included in their statutory goals the extension of knowledge

---

<sup>1</sup> This part of the journal is an updated and extended version of the chapter *System of Education of Older Adults in Poland* in the book edited by R. Kocianova (2013, pp. 98–105).

about ageing and old age, finding – through research – the specifics of how old people function in family conditions, and also the application of new solutions to support old people. Another significant function is also gerontology environment integration.

Both educational practice with seniors, and the data from research on senior learning indicate that “seniors learn differently from young people and learning in the senior age is not so much possible as necessary in order to keep mental fitness until the late age. Thus, the problem of senior education in the perspective of change should be considered, and not the limitation or withdrawal from education. It is worth underlining that educational activities dedicated to seniors may be employed more effectively if the seniors are prepared for old age during the course of their education. This means that they will be characterized by an open approach towards educational activities, will be aware of the level of lifelong learning, and every educational undertaking will be another in a sequence, never the last initiative. They will be methodologically prepared for self-education and self-nurturing. Thus, preparation for the active attitude of seniors towards education will depend not only on the reality in which they remain but also on the past – on their own educational biography” (Fabiś 2005, pp. 153–154). Learning during old age means being inspired by one’s surroundings, being with other people and by one’s self, and learning during everyday situations through participation in various events, both those created and those already extant. Learning during old age will mainly take a non-formal character; nevertheless, the large involvement of seniors in institutional education highlights the important role of non-formal education. According to O. Czerniawska: “The educational aspects of the quality of life are based on the acceptance of the re-interpretation of one’s own experiences and past, searching for forgotten and underappreciated values and re-living them for self-development, for a better life in the present, for the acceptance of changes to one’s own persona through maturation up until today, tomorrow, through the constant projecting of one’s own life, perceiving perspectives in the future, even if the perspective concerns tomorrow, a week from now, a month” (2000, p. 178).

It is widely known that the education of seniors not only alleviates the decrease in cognitive abilities and mental condition that would otherwise be experienced, but also contributes to human development in many areas. From the perspective of personal development, learning becomes a key developmental tool, and helps to improve the quality of life. According to Czerniawska: “Learning does not mean only participation in organized forms of education but it also means becoming aware of educational situations in life and through life, it means opening to one’s self, to others, and to the world. Learning becomes a way of life, a style. This style is the art of expressing thoughts and one’s self” (1997, p.17). From the perspective of social development, learning during old age provides a person with certain competences for taking action in family, social, medical, political, and local areas, and makes it possible to understand others, to communicate with others, to work together, and to support.

Educational activity is crucial in order to “once again determine (or maintain) one’s own social identity” (Wawrzyniak 2009, p. 260).

### **Polish educational policy concerning older people**

The Polish Ministry of National Education and Sport does not reach seniors; even the broadly understood senior education is of only a little interest for this institution. The priority task is currently to apply reforms in primary, lower secondary, and secondary education. The subject of these changes and discussions are: lowering the school age, the reading canon, the forms and content of tests, the parameterization of schools, and professional promotion for teachers. Systemic solutions are currently being awaited by the education profession. It could also be said that modern Polish education policy is not a steady concept, is not created through the setting of long-term goals, results have to be visible in the near future and are superficial and are more of a political and propaganda character than actual content. This explains the short-term but spectacular system changes that in a slight way increase the quality of teaching or reinforce the educational role of school, which would be much more expected.

In the world of economics, roughly 10% of adults are still in some form of education; however, there is no accurate data source on the forms of post-school activity for other adults and for seniors. In Poland, research connected with the education of adults, organized by the Central Office of Statistics, are based on the population between 25 and 64 years of age. Therefore, it is unusual to encounter representative data that characterizes the learning process of seniors in Poland. Non-formal education is in crisis, and this is connected with the limited sources for the maintenance or development of educational-cultural institutions, and potential adult education managers, including older people. Many facilities were shut down in the last few years. Some of the remaining facilities effectively gain funds by using subventions from the state and union. Formal education areas are represented by very few schools for adults. Non-formal education (and some of more formal character) is covered mainly by schools, vocational training institutions, and non-public schools, coaching companies, continuing education centers, foundations, associations, and religious communities. Continuing education centers and practical education centers function very successfully by managing schools for adults at every level, with training, professional, and qualification courses, overall professional lectures aimed at gaining certain competences. At the same time, these institutions extend one’s sphere of knowledge and culture through publishing offers, the organization of conferences, exhibitions, and conducting open lectures. Non-public managers for the education of adults operate in the commercial market, acquire union, national, and self-government funds, and also gain funds directly from their clients. This allows them to constantly extend their educational offers and adjust them to the needs or priorities of their clients. In the last few years, the priority group of education receivers, organized

with union or self-government funds, are people on the edge of old age and in the so-called third age.

In Poland, problems associated with ageing and old age are handled by The Ministry of Labor and Social Policy. It assigns non-governmental institutions for direct activity for the benefit of seniors. The most recent initiative was *The Government Program for Senior Citizens Social Activity for the years 2012–2013*. According to the Ministry website, the program assumed the disposition of 60 billion PLN for activities supporting the activation of seniors, mainly through education, although the goal was described as “the improvement in the quality of life of seniors with dignified ageing through social activity”. However, the priority, which is the education of seniors, becomes apparent in the first two detailed goals:

“Detailed goal no 1. Increase of variety and improvement in the quality of educational programs for older people:

- Creating programs that meet the problems of people who find themselves in unfavourable conditions;
- The promotion of new solutions to motivate seniors to learn in order to stay active, including seniors who find themselves in unfavourable conditions;
- Creating conditions for improving educational-cultural programs.

Detailed goal no. 2. Creating conditions for intra- and intergenerational integration of seniors with the use of existing social infrastructure, among others: extending knowledge on the biological, medical, and social changes that take place with age in order to prepare society for old age” (ibid, pp. 20–21).

A significant undertaking was the assignment on August 16, 2012 of the Senior Policy Department, which was responsible for “creating and developing ways to work for the benefit of seniors, the realization of tasks in the matter of active ageing and other forms of intra- and intergenerational co-operation with seniors, and monitoring the applied solutions. The department also co-operated with organizations and institutions which dedicate their actions to seniors, including international co-operation in the matter of active ageing” (Senior Policy Department MPiPS, 2014), organizing conferences, debates, and competitions connected with the educational activity of seniors.

Another organ assigned in the framework of Senior Social Activity in order to create senior policy was the Senior Policy Counsel. It united representatives of the Ministries, the central organs of public administration, representatives of territorial government units and the third sector, and is accompanied by invited experts. The head of the counsel is doctor Prof. B. Samoliński, PhD. Eng.

Currently in Poland, apart from those projects chosen for realization through competition and individually, there are also some system projects financed by the European Union. The addressees of some of these projects are people over 50 years of age. System projects are one of the formulas for the realization of the tasks included in the Human

Capital Operation Program (POKL). Unlike competition projects, system projects directly realize developmental tasks of the state or given region described in strategic documents, such as *National Development Strategy 2007–2015*, *Social Policy Strategy 2007–2013*, or *Education Development Strategy 2007–2013*. Among the projects directed at people over 50, special attention should be paid to the system projects by MPiPS (handled by the Human Resources Development Center) and the Polish Business Development Agency, including projects: Age as an advantage – training for businessmen; and Active Pensioner and equal chance in the labor market 50+. They supplement the national *Solidarity of Generations* program, which assumes activities aimed at encouraging businessmen to hire people between 45 and 50 years of age and over, and improving the qualifications and work performance of those people (Lt. Cupruś 2012).

Among the results of the POKL program for people over 50 years of age, one can distinguish: “Most participants who are between 50 and 64 years of age gained supporting Priority VI *Labor market open for everyone* – 77 thousand unemployed people were trained, received professional advice, and received psychological-advisory support. Some costs of salaries were refunded by employers (via the so-called employment subsidy) and grants and loans were given for the establishment of business activity.

- 10.4 thousand people who belong to the 50+ group were granted donations for starting their own businesses, which is 8% of all subsidies (...).
- Every second person in the age range of 50–64, registered as unemployed or looking for work, found a job, and every fourth started a business within 6 months of their participation in the project.
- 2 years after their participation in the projects financed by POKL, 91% of people of this age who were working at the time of taking part in the project, still worked – 75% of whom work for the same employer.
- Nearly 50 thousand people in the age range of 55–64 who were at threat of social exclusion, used the social service which supports overcoming individual barriers in returning to the labor market, the service of educational, health and social character and support the mobility of seniors in the labor market, offered in Priority VII *Social Integration Promotion*. 68.3 thousand working adults of age 50 and over took part in training sessions to improve their skills and knowledge, as well as to help them to keep their job in those cases where their job had been at risk through corporate restructuring or bankruptcy (Priority VII *Regional economy staff*). Support of a similar character is also given for Priority II *Development of human resources and adaptation potential of enterprise and health improvement of workers*, where 38.5 thousand working people in the age range of 50–64 used the help available’ (Job for people over 50 by courtesy of European Funds, 2012 pp. 1–2).

Other programs in terms of non-formal education in the Polish education market that are dedicated to seniors were founded *as the initiative of non-government institu-*

tions, which acquire independent funds for activity, either living off member fees or were of a fully-commercial character. An enormous role in local environments is taken by libraries, cultural centers, universities and schools, churches, associations and funds, and local authority units. These institutions, apart from their key tasks, are also dedicated to educating seniors. They establish universities of the third age and senior clubs, although less formalized facilities are also found, such as discussion clubs, and short-term initiatives, which are a result of acquiring financial resources or the completion of a particular goal. One worth mentioning is Słupsk Academy, which since 2012/3012, has organized full, three year first degree studies in the area of regional history, directed at people over 50 years of age. It is an innovative idea, whose results will be observed only after the undertaking has ended. However, there are many undertakings in the education market that support senior education.

### **Adult education institutions**

Among the institutions which are most devoted to adult education, the universities of the third age are dominant. Their number is constantly growing and currently they number almost 400. They help to meet the educational and social needs of the most mobile and independent Polish senior citizens. However, other institutions should be mentioned whose programs reach people in their place of abode, supporting senior development at the limits of educational activity through care and animation-therapeutic activity. These are senior clubs – which are often founded as an initiative of the people concerned as successful educational facilities and also sections in cultural centers, country wives associations, libraries, bands near churches, day care houses, clubs, and many more.

#### **Universities of the Third Age**

Non-formal education includes many forms of education, training, and general and professional improvement, realized by various associations: institutions, organizations, and public and natural bodies. UTWs, as institutions devoted to education, do not work in line with the character of continuous education facilities. This is connected with the need to follow the principles laid out by the Ministry of Education which states that the education manager should provide: a curriculum, didactic staff with the professional qualifications necessary for the proper realization of the educational process, a facility provided with the proper equipment and didactic help to support correct learning, internal supervision in order to improve the quality of education, and the organizational and technical conditions for the full participation of disabled people in education (cf. Suchy 2010, pp. 15–16). UTWs fulfill some of the requirements; however, the points referring to didactic qualifications are especially important, since some people who decide to work with seniors do not have qualifications relevant to adult education. Moreover, lectures conducted at UTW are not subject to any control, so it is difficult to objectively evaluate their quality.

According to a *Zoom on UTW* report, the university of the third age is the most common institution that educates older people. Most facilities were founded in the new millennium and their number has been growing constantly. In 2012 it was estimated that there were 372 facilities in Poland (*Zoom on UTW*, 2012); however, determining the exact number is not possible due to the various initiatives to establish new universities and the lack of formal frameworks for this type of institution. Thus, many undertakings may be considered universities of the third age, although the educational activity itself does not have to be formally set and has very little in common with the traditional understanding of a UTW. Unlike other system solutions, e.g. that in the Czech Republic, no staff minimum is required: they do not have to be connected with the university and they do not have to fulfill any other demands in order to declare the educational undertaking of a university of the third age. Thus, UTWs are found in common rooms, parishes or senior clubs without having fulfilled any formal demands.

Universities for seniors are mainly found in cities; only every tenth facility is located in the country. More than half of UTWs are independent associations or foundations or operate within this form. Every fifth university for seniors operates under the auspices of a higher school, most often non-public. The remainder operate under self-government institutions or in another organizational form.

Their main goal is to support the development of seniors through attending to their intellectual and physical ability: learning, developing interests and skills, and participation in cultural and recreational events. UTWs are also places to spend free time. According to the principles of the first French UTW, Polish universities also direct their activity to gerontology prevention, the promotion of a healthy life style, sports and tourism, and to creating possibilities for establishing and maintaining social relationships.

In 2011/2012, 90 thousand students attended Polish UTWs. According to research conducted in Silesia, among the 65+ age group, 4% used the offer of UTW (*Seniors in Silesia*, p. 103). However, people in their post-productive age (up till now: men 65+, women 60+, currently the same retirement age – 67) are not the only members of UTW communities. When analyzing the evolution of universities for seniors in Poland, G. Orzechowska (2008, pp. 137–144) indicates a few crucial directions of change. First and foremost, the characteristics of senior education have changed. Apart from the noticeable increase in their number, the age structure has also changed. More young people attend (less than 60 years of age): those who retired early or are partially professionally active. This varied age structure is sometimes the cause of problems in the university community, connected with the preparation of the way of working, development of the concept, and the creation of new solutions. The average number of university students is 230; however, every tenth UTW prepares programs for 500 participants and these are most often universities near academic schools, which have their divisions in other cities. One example is the University Of the Third Age in Katowice under the auspices of the Silesian Universities with departments in Sosnowiec and Jastrzębie-Zdrój. Changes have

also occurred in the matter of the educational level of UTW students. Although most often universities for seniors have no criteria connected with the educational level of the candidates, this type of institution particularly attracts better educated people. Currently the percentage of people with higher education is growing and they outnumber those with only a secondary education. In the example of the facility in Lublin, Orzechowska highlights the growth of students with higher education from 26.3% in 1985/1986 to 54.8% in the academic year 2004/2005 (2013, p. 141).

Most UTWs have more than one source of financing. But three quarters of facilities collect fees, of which two thirds are supported by regular fees from students (Zoom on UTW, p. 34). New facilities, before looking for financial support from outside sources, most often rely on the goodwill of their lecturers, who do not receive compensation. This is the case with the Upper-Silesian Higher Pedagogy School of Myslowice and the Senior Academy under the auspices of the Higher Administration School of Bielsko-Biala.

The content of the lectures varies greatly. The typical lectures are most often a set of presentations and only some UTWs plan their lectures according to cycles. However, lectures which meet the interest of seniors – namely medicine, history, tourism, geography, and those that meet their spiritual needs – literature, culture and religion, are all dominant.

**Table 1. Thematic range of lectures carried in the academic year 2011–2012 in Polish UTWs**

Medicine/Health	88%
History	70%
Tourism/geography	69%
Literature	67%
Culture/Religion	66%
Psychology/psychoeducation	63%
Local tradition (including local history and culture)	59%
Economy	52%
History of Art	50%
Law	48%
Natural sciences (astronomy, biology, chemistry, physics)	47%
Philosophy	40%
Sociology/Society	40%
Music	39%

Computer/Information	36%
Politology/Politics	34%
Theater	29%
Film	23%
Fashion and beauty	23%
Sport	19%
Preparing for retirement/late old age	17%
Engineering	7%
Other	15%

Source: Zoom na UTW, 2012.

When analyzing the lectures topics over the years, one can observe that there has been a decrease in interest in medicine and religion and an increasing interest in geography, tourism and foreign cultures (Orzechowska 2008). The data shown in Table 16 seems to confirm the growth of interest noted by Orzechowska; however, the decrease of interest in medicine is doubtful – the data do not confirm this. Additional lectures most often chosen by UTW are usually connected with three areas: computers, language courses, and sports activities. Lectures connected with art (painting, dancing) and hand-crafts are also popular. Furthermore, seniors enjoy tourism and recreation.

**Table 2. Lectures offered to UTW students in the academic year 2011/2012**

Computer classes	88%
Language courses/lectures	87%
Sports activities	85%
Art classes (e.g. drawing, painting)	65%
Tourism lectures and sections	63%
Dancing courses/classes	56%
Handicrafts (e.g. embroidery, pottery, decoupage)	52%
Music lessons and bands (e.g. choirs, folk band, instrument classes)	44%
Literature classes (including reading clubs)	36%
Photography classes	35%
Theater/cabaret classes and groups	33%
Social games clubs (e.g. bridge, chess)	31%

Psychological-therapeutic classes/psychoeducation/personal development	29%
Lessons concerning memory training	25%
History/Local history	22%
Literature/journalism/creative writing	18%
Voluntary classes	17%
History of Art	15%
Cooking classes	14%
Film lessons and discussion groups	13%
Cultural/religion studies	9%
Intergenerational clubs	8%
Lessons preparing for retirement or late old age	5%

Source: Zoom na UTW, 2012.

When analyzing the currently developing educational space of the existing facilities, Orzechowska notes new trends connected with the individual needs and interests of seniors. For instance, UTW in Olsztyn lists the following solutions:

- “new, very often unique lectures: Esperanto, Italian and Spanish,
- New plastic art techniques: e.g. pergamano, whose leader has received an international certificate.
- Modeling: fashion shows that require physical movement, visage, personal exhibitions etc.
- Education for voluntary work: not just amateur work but the professional preparation of candidates for voluntary work in Wojewódzkie Centrum Wolontariatu (District Voluntary Centers).
- Learning about the needs of the environment: organizing collections for the poor and those in other dire straits (for two years UTW have funded meals for 10 students at the periphery school with children who require special care),
- More and more presentations of students’ own achievements in the closest and further environments: exhibitions and presentations in cultural centers, participation in Days of Olsztyn, Senior Day, in the international exhibitions of non-professional artists in the country and abroad,
- Gathering funds for educational activity in regional competitions and union projects etc.” (Orzechowska 2013, pp. 131–132).

W. Wnuk (2012) observes that UTW has become more than just a place of education in the traditional understanding. Crucial functions of this institution are care, sup-

port, and help. The care service, which is widely known, is described by Wrocław UTW through the following tasks:

- “proposing education covering physical and intellectual development;
- Supporting development in every possible dimension (still triggering potential developmental);
- Minimizing physical and mental stress;
- Providing emotional support for difficult moments (e.g. for widows, those who receive bad medical diagnoses);
- Prolonging the time of actual activity in order to maintain an independent life without the need for institutionalization (no more long queues at DPS);
- Exchanging information and coordinating events between social branch partners and other possible subjects that function in the web of social support;
- Minimizing the threat which can lead to disability and discomfort deriving from unfavorable bio-psycho-social conditions;
- Organizing common events for the good of people;
- Applying sections and support groups (that solve their own and other problems with the use of mutual help)” (Wnuk 2012, pp. 65–66).

As it seems, the idea of the UTW in Poland has found a wide application. The development of the UTW is not only about quantity but also about quality. Apart from traditional universities for seniors, there are new and changing traditions that meet the actual needs of older people.

### **Senior clubs**

Apart from UTW, there are also senior clubs – community institutions which support and activate seniors –in the area of education. Their number is not sufficient compared to what is needed, but the tendency in this matter is growing. Originally, after the Second World War, their existence was connected with the adjustment of seniors to new circumstances in life. Later, their activity was focused around care so as to finally transform into animated institutions, which create the conditions to undertake various activities, mainly cultural, educational, social, and recreational. Zofia Szarota describes senior clubs as, “facilities of social normalization through preventing solitude, social isolation and uselessness and also through supporting the intellectual and creative abilities of older people” (2010, p. 153). The aim of these clubs is the organization of free time for seniors through various activities. Facilities of this type fulfill crucial functions and support the social and intellectual development of older people. A. Chabior distinguishes the following functions:

- “Integration function, which through club activities allows active people to adjust better to group work, establishes new, valuable interpersonal relationships both on an intra- and intergenerational level.

- Educational function [...] Currently, due to the very well-developed lectures of an educational character [...] their function is also connected with senior clubs, which from typical recreational and free time facilities very often turn into educational facilities.
- Compensatory and adaptive function, where the first is based on smoothing out deficiencies (real or supposed) in other areas of social life. The latter is based on the better adjustment of seniors to life in a new social and family situation.
- Recreational-entertainment function – which helps to eliminate stress, reviving the will to live, to motivate and inspire for further activity” (Chabior 2011, pp. 103–104).

Chabior (2011, pp. 104–107), who collected data from members of such facilities in Kielce, briefly characterizes members of senior clubs. According to the analysis, the majority is women, and their biggest group is between 55 and 60 years of age; the older the women, the smaller their representation among members of senior clubs. However, the majority of men are in their seventies. Nearly half of all the members have secondary and primary education. Most often, seniors get to know about senior clubs from friends, but press and advertisements are also a good source of information. Those members asked for their reasons behind joining the club indicated the desire to do something connected with their interests. Almost every fifth member treats club membership as an escape from loneliness with the simultaneous motivation to make new friends. Another important factor is the motivation for continuous development.

The programs offered by senior clubs are directed at all older people. Among the forms of activity, sport activities are the most preferred by members of clubs in Kielce as indicated by two thirds of respondents, events (one third of the surveyed) and artistic lectures.

The example of a senior club in Piła is presented below.

**Table 3. Senior Club program in Piła – July 2014**

Date	Time	Title
Tuesday 01/07/14	3 pm	“Card paper chase” 1000 competition part 1
Wednesday 02/07/14	4 pm	“Brainbox” – general knowledge competition
Thursday 03/07/14	9 am	“from the two-wheeled perspective” – trip of the “silver spoke” group
	4 pm	Meeting with zoo psychologist. Human-animal relations
Friday 04/07/14	3 pm	Scrabble, part 1
Saturday 05/07/14	4 pm	“Summer karaoke” – everyone can sing
Monday 07/07/14	2 pm	July bridge games. Competition
Tuesday 08/07/14	3 pm	Draughts madness. Part 1 – competition for volunteers

Date	Time	Title
Wednesday 09/07/14	3 pm	Black ball – women's billiard competition, part 1
Thursday 10/07/14	9 am	When you ride a bicycle over a hill, listen to the sounds of nature. Bicycle trip with "silver spoke" group
	3 pm	Bridge for volunteers
Friday 11/07/14	3 pm	I water my flowers. Holiday gardening
Saturday 12/07/14	4 pm	"Charades summer"
Monday 14/07/14	2 pm	Bridge competition
Tuesday 15/07/14	3 pm	1000 competition part 3
Wednesday 16/07/14	3 pm	Scrabble part 3
Thursday 17/07/14	4 pm	Janek Kos club garden shooting competition
Friday 18/07/14	3 pm	Black ball /men competition/
Saturday 19/07/14	10 am	Picnic for seniors at "TARCZA"
Monday 21/07/14	2 pm	Monday bridge competition
Tuesday 22/07/14	3 pm	Checkers for guys and gals
Wednesday 23/07/14	3 pm	Artistic Recycling "The second youth of everyday objects", part 2
Thursday 24/07/14	12 am	July program meeting
Friday 25/07/14	3 pm	Dart course
Saturday 26/07/14	4 pm	"Garden show" /picnic in the club garden/
Monday 28/07/14	2 pm	"Summer bidding" bridge competition
Tuesday 29/07/14	3 pm	Bridge, part 2
Wednesday 30/07/14	3 pm	Women black ball – competition, part 2
Thursday 31/07/14	9 am	"Silver spoke" group trip
	4 pm	Pneumatic weapon shooting. Janek Kos competition.

Source: Senior club in Piła 2014.

Free time organization in senior clubs is, unlike UTW, less formalized, freer, closer to non-formal education, learning, and discovering. The club gives the participants a lot of freedom and autonomy. The choice of activities is not long-term, the program for the various activities is rather short-term, and most often focused on recreation, games, playing, moving, physiotherapy, manual improvement, cultural development, and also

learning via courses, discovering the world in a pleasant way (journeys, discussions), meetings with interesting people, and being with other people.

### **Other institutions**

In some cities there are Senior Activity Centers (CAS) which are organized e.g. by local authorities, cultural centers, or NGOs. Lectures in CAS are of a similar character to UTW meetings; however, the second type of organization is of a more academic character. Other locations include daytime social care centers, which are institutions focused on the realization of social policy dedicated to free time management for seniors who are not fully independent. In many cities of Western Europe, solutions such as daytime care centers for seniors are standard: they offer care for older people and organize activities for when the rest of the family have work commitments. In Poland, daytime care centers are institutions which are slowly becoming popular solutions.

### **Senior learning profile through the example of UTW students**

In Polish institutions of an educational character, one mainly finds the youngest seniors – and the better educated. Among these, there are people who live mainly in cities, mostly women – they are in a better situation and are a more emancipated group within this population in Poland.

Based on the example of students from UTW in Oświęcim, an attempt could be made to create a profile of a senior learner of the University of the Third Age (Fabiś, Łacina-Łanowski 2013).

Seniors who take part in UTW lectures also like to read. Almost half of them read one or two books per month, the rest read less. In most cases, seniors read biographies; almost half enjoy the *belle lettres*. Almost every fourth senior reads poetry, romance, and science-fiction literature.

The most common activity for seniors is spending time in front of the TV. 38% of those surveyed watch TV for about 2–4 hours per day, one third – for 3–4 hours per day. Most often, they watch information programs, soap operas, and serials. Every third person looks for entertainment when watching TV, and every tenth is interested in programs about religions.

Only some UTW students declare a total lack of interest in music. Half turn on music during selected activities, and 38% declare that they have music turned on all the time. Three in ten turn on music in order to listen to it or to aid contemplation. The term that seniors use to define their music preferences is “music from my youth”: this answer was marked by two thirds of the respondents. More than half declare that they listen to classical music. When it comes to determining favorite songs, most often they are by Polish artists from both modern entertainment and classical music.

The Polish senior is often characterized by a rich religious life. Although religion is a very important matter for 40% of UTW students, it is surprising that two in ten students claim that religion is of little or no meaning in their lives. The remainder evaluates the importance of religious activity as average.

When analyzing the declarations of seniors concerning their political preferences, most of them – nearly half – declare their support for the ruling center party (Citizen Platform). One third is not interested in politics, and the rest divide their votes among right and left-wing parties.

The self-image of UTW students (Hasińska and others, 2012) is based on a few basic activities, which characterize Lower-Silesian students, such as: intellectual activity, the will to learn, curiosity about the world and its people, and a readiness to organize their own life and physical activity. Other phrases that describe UTW students are: interest in culture and art, independence of thinking and opinion, self-confidence, a wide range of interests, the ability to handle difficult and new situations, and satisfaction with life. Such opinions were expressed by 83–89% of those surveyed. Among the characteristic features which students describe when they talk about themselves, the dominant are: honest, independent, curious, solid, and hard-working. These items were indicated by 65–87% of the respondents. Others, expressed by more than half of the surveyed, include: organized, sensitive, optimistic, helpful, realistic, sociable, sane, and intelligent.

However, among the declared values, 90% are: honesty, health, material safety, friendship, honesty, wisdom, and knowledge. More than 85% also mentioned family, honor, and faithfulness – and love as a value was declared by nearly 80% of respondents.

## **Specifics of learning in old age – senior perspective**

The education of seniors is characterized by an extended freedom of choice as far as educational content is concerned. The freedom to learn has allowed seniors to gain knowledge, shape skills, and gain new competences which are derived from their interests and are determined by intrinsic motivation. An analysis of the research on two of the most popular courses for seniors makes it possible to present the didactic process from their perspective.

### **Information education**

An analysis of the research on the motivation, expectations, and needs of UTW students connected with learning about new media (Jurczyk-Romanowska 2012, Tomczyk 2012) allows one to distinguish a few areas that are especially important from the perspective of the didactic process. The basic factor which encourages the decision to learn how to operate a computer and/or to use the Internet is mainly the sense of digital exclusion, which in turn influences the quality of one's participation in social and family life.

Seniors noticed that activities which demand the use of new media are more expansively entering every-day life, and they, as the digitally ignorant, have to withdraw from a wide range of activities and contact with others since they cannot handle new media. Seniors also indicate the need to gain and extend information technology competences because of the job they do – this concerns people who are still professionally active. Very often, the motivation to gain computer skills comes from an attempt to become independent and to have a more intensive existence in many areas of life. Others indicate their curiosity, the desire to test themselves, and to learn something new. E. Jurczyk-Romanowska underlines that, in their opinions, seniors express some kind of sense of pressure concerning computers and internet usage. The modern media are omnipresent, crucial for work but also in the family and in terms of contact with the younger generation. Day to day life creates opportunities to use such skills, and seniors recognize these and undertake the proper educational actions in order to fulfill themselves in this area. One interesting form of extrinsic motivation is also the need to study after the prior purchase of computer equipment. The possession of such a device obliges its use and, as a result, the need to educate oneself in that area.

The expectations and needs of seniors concerning their participation in computer courses focus around a few issues. Obviously, seniors expect a different approach, a different learning methodology, which would be specific for their age. They underline the expectations of the teacher, the right book, the learning tempo to be adjusted to their capabilities, and emphasis placed on repetition and revision of the course material. The source of their expectations are mainly earlier didactic failures during other courses or in relation with family members who played the role of teacher. In computer education, seniors indicate one more important factor that is an obstacle in gaining new competences – the English language. Descriptions, commands, messages in English, and even their Polish-translated equivalents, complicate the didactic process for seniors. The Participation of peers lends a sense of peace and confidence. A hermetically-sealed group guarantees a similar level of advancement and similar chances for results, without the necessity to adjust to younger people. Seniors expect that the course will allow them to rid themselves of their fear of using such devices. After gaining basic computer skills, many expect the continuation of courses at a higher level.

### **Language learning**

Among the most commonly offered courses for seniors, right behind information courses, the dominant form are foreign language courses. Mainly, this is English language learning. However, in Silesia, in the Opolskie district or the districts which are near the German border, the German language is also popular. The motivation to start this kind of education focusses on the very utilitarian need to communicate during foreign journeys or to understand basic phrases and words when working with a computer. Learning a foreign language is also a form of training which activates mental ability, and

is a way to spend free time. At the same time, the research (Jurczyk-Romanowska 2012) shows that seniors are aware of the difficulties in foreign language learning; they express a range of doubts and expectations connected with the language learning process. They expect content which will interest them, but first and foremost, their main goal is communication, without unnecessary grammar or vocabulary. Seniors express the belief that the atmosphere, interesting people, and an approach specific to seniors as learners, provide the proper conditions to foreign language learning. The adjustment of the tempo of learning to this homogenous group, the right book, and a curriculum unique to their age group, will provide an effective atmosphere for senior education. Anna Jaroszevska, who has conducted research on the expectations and needs of Polish seniors who have started learning a foreign language on foreign courses (2013, pp.137–140), confirms the above-indicated mechanisms and adds the need for independent activity by seniors, the expectation of participation in the planning and organization of didactic events, and an individual approach to each and every student, with full consideration of individual psychophysical abilities. The skills gained must be useful in life situations. Also, the strong need to learn about culture of the chosen language may be indicated. The willingness of seniors to correct their mistakes is especially interesting, and comes thanks to the right reaction of the teacher. They express a willingness to participate in the evaluation of lectures in order to track progress. They also highlight the importance of atmosphere during the lessons.

### **Senior Education Specialist**

On July 1<sup>st</sup> 2010, a regulation was put forward by the Ministry of Labor and Social Policy according to which, due to the initiative of the Academic Andragogy Association, andragogy was added to the list of professions and specialties. This initiative was an answer to the need for adult education specialists, whose task will be the widely-understood support for adult human development with the use of mainly educational methods. According to the shortened description of the profession: “Andragogy describes, examines, organizes, realizes, coordinates, and inspires the educational activity of an adult person, which is undertaken in the statutory education system – general and professional education: formal, non-formal in various environments (local communities, work environment, non-formal groups); realized goals of state education policy in the matter of human and social capital” (Andragog, 2010, electronic doc.).

The places of work of the andragog are adult education facilities, schools, training companies, continuous and practical education centers, and also those institutions in which the andragog fulfills the role of education actions coordinator – offices, work places, career bureaus, cultural centers and public order and social support institutions, and non-governmental organizations. The term andragog refers to the person dedicated to educating adults, observing the phenomena connected with the adult human, forming

theories as well as being an educator, a person who works for the benefit of adults. The requirement is graduation from I or II level andragogy specialty.

Nevertheless, the specialty of adult people educator cannot be found on the ministerial list of professions and specialties. A few Polish universities offer pedagogy specialties in the area of adult education, but these are not very popular. It may seem that especially the second degree geragogy studies would have a chance to be a success, since during their education, students are more aware of the necessity of educational work with adults, including seniors by verifying their perception of pedagogy as a discipline dedicated to the education of children and youth. In practice, these specialties, regardless of level, are seldom chosen and sometimes closed, since the number of students is insufficient.

When analyzing the educational offer in the matter of geragogy – as most schools defines adult education, in higher education a synthesis and generalization may be made which depicts the didactic process and professional future.

Geragogy (gerontopedagogy, social gerontology) most often occurs in connection with specialties: social pedagogy, care pedagogy, adult education, or as an independent specialty. Education may take place at I and II degree studies or faculty in a stationary or non-stationary way at a few public and non-public schools in Poland.

Absolvents are specialists with interdisciplinary knowledge, skills and competences, with a stress on a chosen area of interest – depending on the policy of the organizers who manage the studies. Professional preparation is focused mainly on: social care, gerontological care, ageing psychology, medicine studies, and educating seniors. Special competences refer mainly to: diagnosis, prevention, treatment, activation, support, advice, and therapy for seniors.

The place of work of geragogs are educational-cultural and care facilities, social help centers, health care facilities, hospices, senior clubs, sanatoriums, and daycare centers.

## Conclusion

An ageing society is one of the most important challenges which are currently faced by European countries. This problem is also becoming an issue for Poland. It is crucial to take action in the social, economic, and political spheres, to alleviate the negative consequences of this process, to support preparations for old age, and to help to improve satisfaction with life in the last developmental stage. The activity of Polish seniors is outside the range of interests of Polish educational policy. A much greater level of interest in the problems connected with societal ageing is expressed by the Ministry of Labor and Social Policy. The next funding allocation for the improvement of senior life based on the ASOS program in 2014–2020 will be funded by 280 million dollars, which means 40 million a year (about 10 million euro). The money will be mainly spent to achieve the

following goals, among which the first refers to teaching seniors, although to a certain extent, each of the goals refers to educational activity:

- “Improvement in the variety and improvement to the educational offer for older people (...).
- Creating the conditions for inter- and intragenerational integration of seniors with the use of the existing social infrastructure (...).
- The development of various forms of social activity, including the promotion of voluntary work, the participation in decisions, social life, including the participation of older people in shaping public policy.
- Increasing accessibility, improvement to social service and support for activities for the benefit of self-help and self-organization.” (M.P., 2013, sec. 53, p. 11).

Without doubt, there is a need in Poland to create the conditions for the development of older people in many areas. Although education at UTW and in senior clubs has been developing well, the possibilities within education are still limited for less emancipated seniors. There are elderly people, living in small towns or in the countryside, poorly-educated, disabled and chronically sick. It seems that the education policy should support non-formal education and create the conditions for non-formal learning, promote reading, and cultural and recreational undertakings, and promote knowledge which is the access to learn by action.

There is also a need to educate specialists in the matter of senior education, although, judging by the low interest in geragogy studies, the desire to study in that area is low. Also, the job market does not yet offer many places of occupation and in the current classification of professions and specialties, geragog, geronto-pedagogue and gerontologist are not currently found. This profession may make a big difference in the near future, when the need to support the growing population of seniors will become far more noticeable.

## Bibliography

- CHABIOR A., 2011, *Aktywizacja i aktywność ludzi w okresie późnej dorosłości*, Wszecznica Świętokrzyska, Kielce.
- CZERNIAWSKA O., 1997, *Uczenie się jako styl życia*, [w:] M. Dziegielewska (red.), *Przygotowanie do starości*, Łódź.
- CZERNIAWSKA O., 2000, *Drogi i bezdroża andragogiki i gerontologii*, Wydawnictwo WSHE, Łódź.
- FABIŚ A., 2005, *Edukacja seniorów – odpowiedź na wymagania współczesności* [w:] A. Fabiś (red.), *Unowocześnianie procesu kształcenia dorosłych. Wyzwania Współczesnej*

- Edukacji Dorosłych* (tom 2). Wydawnictwo Górnośląskiej Wyższej Szkoły Pedagogicznej im. Kardynała A. Hłonda. Mysłowice–Zakopane.
- FABIŚ A., ŁACINA-ŁANOWSKI A., 2013, *Uniwersytet Trzeciego Wieku w Oświęcimiu – krótka monografia instytucji*, [w:] A. Fabiś, A. Łacina-Łanowski, Ł. Tomczyk (red.), *Kreatywna starość*, Wydawnictwo Państwowej Wyższej Szkoły Zawodowej w Oświęcimiu, Oświęcim.
- JAROSZEWSKA A., 2012, *Potrzeby i oczekiwania seniorów w kontekście ich udziału w zagranicznych kursach językowych*, [w:] E. Dubas, A. Wąsiński (red.), *Edukacyjna przestrzeń starości*, „Biblioteka Gerontologii Społecznej”, nr 1.
- JAROSZEWSKA A., 2013, *Nauczanie języków obcych seniorów Polsce. Analiza potrzeb i możliwości w aspekcie międzykulturowym*, Wydawnictwo Impuls, Kraków.
- JURCZYK-ROMANOWSKA E., 2012, *Motywacje, oczekiwania i postulaty towarzyszące seniorom w podjętej edukacji informatycznej*, [w:] E. Jurczyk-Romanowska (red.), *Trzecia zmiana*. Wydawnictwo Naukowe Instytutu Technologii Eksploatacji, Wrocław.
- KOČIANOVÁ R. (red.), 2013, *Analysis and comparison of forms and methods for the education of older adults in the V4 countries*, Univerzita Karlova v Praze, Filozofická fakulta, Praha.
- ORZECZOWSKA G., 2008, *Young-old Uniwersytet Trzeciego Wieku. O zmianach, doskonaleniu form edukacyjnych i podnoszeniu jakości kształcenia*, [w:] A. Fabiś (red.), *Aktywność społeczna, kulturalna i oświatowa seniorów*, Wydawnictwo Wyższej Szkoły Administracji Bielsku-Białej.
- ORZECZOWSKA G., 2013, *Słuchacze uniwersytetów trzeciego wieku w rozbudowywaniu przestrzeni edukacyjnej*, [w:] A. Fabiś (red.), *Współczesne oblicza starzenia się*, Wydawnictwo Naukowe „Śląsk”, Katowice.
- ROPS, 2012, *Seniorzy w województwie śląskim*, Katowice.
- SUCHY S., 2010, *Edukacja dorosłych pracowników i bezrobotnych*, Wydawnictwo Difin, Warszawa.
- SZAROTA Z., 2010, *Starzenie się i starość w wymiarze instytucjonalnego wsparcia*, Wydawnictwo Uniwersytetu Pedagogicznego w Krakowie, Kraków.
- TOMCZYK Ł., 2012, *Wybrane determinanty kształcenia seniorów w dziedzinie nowych mediów na przykładzie Cieszyńskiego Uniwersytetu III Wieku*, [w:] E. Dubas, A. Wąsiński (red.), *Edukacyjna przestrzeń starości*, Wydawnictwo Śląsk, Katowice.
- WAWRZYŃIAK J. K., 2009, *Rozważania na temat motywacji i uwarunkowań uczestnictwa w zajęciach Uniwersytetu Trzeciego Wieku*, [w:] A. Fabiś, B. Cyboran (red.), *Dorosły w procesie kształcenia*, Edukacja Dorosłych, Bielsko-Biała - Zakopane.
- WNUK W., 2012, *Oddziaływania o charakterze edukacyjnym w profilaktyce gerontologicznej*, [w:] J. Gulanowski (red.), *Uniwersytet Trzeciego Wieku – przeciw wykluczeniu dla społeczeństwa wiedzy*, Wydawnictwo Uniwersytetu Wrocławskiego, Wrocław.

### **Web pages**

Ministerstwo Pracy i Polityki Społecznej, 2005, pozyskano z: Strategia Polityki Społecznej na lata 2007–2013, dok. elektr., [www.mpips.gov.pl/gfx/mpips/userfiles/File/nowe/strategiaps.pdf](http://www.mpips.gov.pl/gfx/mpips/userfiles/File/nowe/strategiaps.pdf)

Andragog, 2010, pozyskano z: [www.ata.edu.pl/index.php?view=article&catid=1%3Alatestnews&id=70%3Aandragog&tmpl=component&print=1&page=&option=com\\_content](http://www.ata.edu.pl/index.php?view=article&catid=1%3Alatestnews&id=70%3Aandragog&tmpl=component&print=1&page=&option=com_content)

Zoom na UTW pozyskano z: [zoomnautw.pl/raport-z-badania/](http://zoomnautw.pl/raport-z-badania/)

### **Legal acts**

M. P. 2012, poz. 642, *Uchwała Nr 137 Rady Ministrów z dnia 24 sierpnia 2012 r. w sprawie ustanowienia Rządowego Programu na rzecz Aktywności Społecznej Osób Starszych na lata 2012–2013.*





Łukasz Tomczyk

# METHODS AND FORMS OF SENIOR EDUCATION<sup>1</sup>

## The specifics of educating seniors

The differences between the educational processes at particular stages of life<sup>2</sup> may be considered from different angles: goals, needs, learning motivation, the subjectivity of learning by adults, abilities to gain competences along with the consideration of cognitive changes (ageing of minds, changes in cognitive function, including to the memory), social, cultural, civilizational conditions (time for more or less encouragement regarding education, which promotes knowledge as a value and a source of a happy life). Also, important factors which should be considered in the didactic context include: contents, methods, forms, didactic sources, the specifics of the educational facility, the role of the teacher of adults, and the operation of the educational process. During life, the aforementioned conditions change, so the educational situation of older people is subject to a constant didactic approach in every stage of life (Dubas 2009, p.129).

It should be mentioned that the specifics of teaching seniors is connected with a few crucial issues, among others:

- The specific attributes of the learners – their own features, life experience, approach to the content, psychophysical condition, motivation, and material resources;
- The learning style derived from the methodological-personal qualities of the teacher;
- The learning style of older people – their preferred way to acquire knowledge and skills;

---

<sup>1</sup> This part of the journal is an updated and extended version of the chapter *Methods of Education of Older Adults in Poland* in the book edited by R. Kocianova (2013, pp. 106–112).

<sup>2</sup> The specification of these phases is possible from a number of angles: legal, biological, cultural, and mental.

- The features of the facility – lectures in institutions devoted to the specific group are performed differently from courses, where the ages of students in the group can vary;
- Subject didactics connected with the choice of educational tools, methods, forms, sources, contents, exercises, audiovisual aids, and information tools.

According to E. Skibińska, “the basics of every educational process, on which the further actions of the teacher and the seniors who are learning depend, are set by learning goals” (Skibińska 2008, p. 98). It should be mentioned that general educational goals are strongly connected with the transformation of the surrounding world. They reflect the changes connected with the dynamics of social, political, economic development on a macro scale with the consideration of the specifics of each cultural area. Understanding the modern world and the conscious participation in many areas of everyday life is a basic assumption of adult education. Searching for the most appropriate teaching goals is not a simple activity for teachers, and their formulation with full consideration of the needs of the adult students demands a huge level of knowledge in the matter of social gerontology and empathy. Transferring the stress in educating adults from teaching to learning implicates the involvement of seniors in constructing their own learning goals. Assuming that the core of senior education didactics is the transfer of the decision making, activity, and responsibility for education to the learners, the educational goals become individual projects which meet the needs of the individual.

Considering the changes to the main area of interest in gerontology, which currently does not include only those processes connected with education adults, but also refers to the issues of lifelong adult education, current education goals should be redefined. Based on the theory by R. McCrae and P. T. Costy (2006) on the steadiness of unit personality in adulthood, scientists have formulated a 5-factor personality model, made up of: neurosis, extraverted, openness to experience, amicability, and conscientiousness. Based on both their own research and conclusions drawn from research by other scientists, McCrae and Costa came to the conclusion that the way in which the early stage of development functions determines existence in old age. Thus, as it transpires, personality is a permanent core, on the basis of which any adaptation to a changing reality takes place. Thus, educational goals, however formulated or defined, do not contribute to personality change but are only an indicator for attaining the desired knowledge or skills.

Any discussion of educating older people should include reference to one of the many taxonomies of educational goals, in this case those proposed by A. Fabiś (2005). The division of goals presented below is connected with three elementary functions: emancipative, altruistic, and egoistic.

**Emancipative function** directs the educational process for the individual improvement of the quality of life, attending to life satisfaction and the steady development of

interests, freeing oneself from oppressive conditions, and the creation of a better future. Nevertheless, emancipation refers mainly to actions for the benefit of senior societies, so it is considered within the macro domain, with reference to other generations. The basic goal in this matter is to provide seniors with a strong position in the social structure. Among the goals detailed, the following should be distinguished:

- The maintenance and development of activity in many areas in the life of seniors, which may be one of the determinants of living a dignified old age. Learning in old age allows seniors to maintain proper competences to act, as well as to discover new activities, to enter a world which was unknown until now, which stimulates constant development, to free oneself from stereotypical roles, and to exist in many areas of social life.
- **Care for the position of seniors in various environments** is seen as an emancipative task; seniors make their presence felt in new areas of social life and reinforce their position in areas represented already by this age group. From the perspective of the needs of seniors, activity in this matter is a form of fulfilling needs, recognition, and belonging.
- Creating leaders among seniors **creates the possibility to emancipate this generation**. Self-dependence and independent existence in this sense take the form of actions for the benefit of seniors by older people. Leaders among seniors are strong units of action, they inspire, initiate and unite themselves around others, leading to the creation of creative and active communities.
- **Handling a changing reality** is connected with the incredible dynamics of change along with technological development but also with social and cultural changes.

**Altruistic function** in adult learning refers to activity for the benefit of others. This activity may even take the form of a lifestyle, and for seniors is an obvious, desirable action which builds the identity of an adult person. In this category of educational goals, one may distinguish:

- **Understanding of the world** – described as the constant acquisition and extension of general knowledge, and understanding the changes that occur in the surrounding world. Understanding has to lead to acceptance and the recognition of the needs of other human beings – and finally to not only understanding, but also taking action for the benefit of others.
- **Actions for the benefit** of others e.g. voluntary work; the acquisition of competences to act for the benefit of other people, the discovery of the meaning of being other people and being there for them. It is a feeling of being useful to those who need support.
- **Communication with others** on various levels – from family or social relationships to professional, allows seniors to get closer to others, get to know them, and to act for them. Intergenerational dialogue creates many barriers e.g. distance, technology,

language. Learning leads to overcoming these barriers, which leads seniors to get closer to other people, to establish relationships and to work for their benefit.

**Egotistic Function** is a healthy egoism which enables self-development. In old age, care should be taken of not only the family or the local environment but also one should concentrate efforts on self-development, which is a form of the full development of humanity. In this matter, one should distinguish:

- **Personal development**, which refers to the constructive assumption of developmental psychology, so lifelong development until the end of life. Thanks to education, humans can develop in chosen areas and can extend the reach of human knowledge.
- **Handling existential problems.** Old age is a time during which a person with life experience may confront his/her existential concerns by searching for the answer to the most difficult questions about God, the meaning of life, and an evaluation of their own existence. Learning helps to confront existential concerns, to become smarter, to finally evaluate one's own life and prepare for death.
- **Spiritual development.** Life in the state of rich spirituality in old age is determined by the maturity of the person. This is the development of the most intimate sphere of human life, getting closer to the absolute, so is connected with the development of spirituality, searching for higher values, and with transcendence.

To sum up, the above-mentioned considerations in reference to educational goals, it should be underlined that they lead to the most basic areas connected with the need to "understand and interpret the surrounding world, to have one's own skills which make everyday life easier, taking care of the self, and the achievement of the highest standards connected with these issues" (Skibińska 2008, p. 100).

Education in institutions such as UTW takes place with the help of different methods than in the traditional pedagogical model<sup>3</sup>. Moreover, the specifics of teaching older people change depending on the age of the people who are starting education since particular age groups have totally different educational biographies. In light of this fact, the elementary issue is that the educational system of adults-seniors is based on the andragogical model, which is different in many areas from the pedagogical (school) model. The andragogical model of education in old age features the following elements (Knowles, Holton, Swanson 2009, pp. 65–69):

---

<sup>3</sup> It should be underlined that the typical pedagogical assumptions and models refer only to teaching children, which demands a different approach towards the teaching process than with adults. In these models, the responsibility for what and with what methods a child will be taught – the subject of education – is the responsibility of teachers, unlike in the case of adults, who are self-dependent and have concrete didactic needs.

- **The need for knowledge.** Adults must know, before they decide to study a chosen area of knowledge, what the reason is behind their decision to become active in education, and why they want to learn. Considering one of most important paradigms in adult education, it should be underlined that the main task for facilitators of learning is to help students to realize the need for knowledge. In the case of UTW students, the phenomenon often appears of making up for deficiencies left over from formal education. Seniors, through deficiencies in their education, and a willingness to develop hobbies, which due to many reasons were neglected at the early stage of life, have a need to gain new knowledge and skills<sup>4</sup>. Also, it should be underlined that UTW students form a specific group within the group of elders, generally at a high intellectual level, active members who break the stereotypes of the chronically ill, dependent person.
- **Constructing the image of the self as a learner.** This is an extremely interesting issue, since adults who return to the role of students in an institutional form find themselves in an antagonistic situation. On the one hand they want to be independent and to make decisions about the educational process; on the other hand, they must submit to the education in many situations. Returning to this role, this time to an institution directed towards people in late adulthood, allows them to change their views about the processes connected with learning and teaching<sup>5</sup>
- **Significant life experience.** Older people start their education at UTW with a huge range of different experiences deriving from the length of their lives<sup>6</sup>. Adult groups feature greater heterogeneity when it comes to the origin, education, learning style, motivation, needs, interests and goals of the students; thus, the focus in educating adults is put on the individualization of teaching and learning<sup>7</sup>. The experience

---

<sup>4</sup> The didactics of teaching older people are problematic, however, as they demand the choice of proper program content, teaching methods, the application of didactic sources adjusted to their age, and the principles of learning. Unfortunately, in the context of UTW students, this area demands the performance of constant analyses since it is still a new area. In the subject literature in the matter of social gerontology over the past few years, the first detailed analyses are beginning to appear concerning the specific conditions of senior education e.g. ageing psychology, geragog profession, teaching methods in the matter of information technology.

<sup>5</sup> UTWs are unique institutions concerning their choice of teachers, since in most cases these are people much younger than the students, so in comparison with a traditional school e.g. elementary school, which is remembered by older people as a completely different educational model based on reverse transmission since it is young people who are the source of knowledge and teach the older.

<sup>6</sup> The best example is the difference in the matter of the process of becoming competent in information technology. For the younger generation new media are a natural environment and numerous e-services are integrated with reality (e.g. shopping, communication, information), whereas for older people, understanding and finding themselves in the virtual worlds requires education.

<sup>7</sup> During lessons in the computing section of the UTW in Cieszyn seniors propose the lesson topic. The differences among the group are expressed in different levels of competences, the different reasons for learning e.g. some want to communicate with family abroad, others with friends in

gained carries a negative outcome in the form of the tendency to use those habits of prejudice and assumption which may close the minds of learners to new ideas and an alternative way of working<sup>8</sup>. Reaching the mental state of openness to new possibilities comes from the proper support of the teacher. Geragogy, through the application of correct arguments and by underlining the utilitarian character of solutions, is able to encourage students to use new tools, solutions, and ways of thinking.

- **Readiness to learn.** Unlike children, adults become ready to learn in situations where they need to possess certain information or skills in order to effectively solve life problems.
- **Specific orientation in learning.** Unlike the orientation where learning is focused on the subject, a situation which most often appears in traditional school education, education at the UTW is focused on problems connected with life. The motivation to learn is determined by situations in which the acquisition of new knowledge, skills, and values allows students to function freely.
- **Motivation.** During intermediate adulthood, people are vulnerable to the various factors of external motivation, such as: better work, promotion, higher salary (Kocianova 2012). In turn, during late adulthood the kind of determinants change, favoring certain activities<sup>9</sup>. Stimulants that most strongly affect seniors are outside factors (improving self-confidence, life quality, willingness to change everyday function etc.). The research carried by Tought showed that adults, regardless of age, are motivated for constant change, but this motivation is blocked by: negative self-image, lack of access to chances or resources, time limitations, and the violation of principles concerning learning by adults in educational institutions.

## Methods and forms of education and the educational offer

Even the most consciously-chosen goals, and most appropriate content, cannot guarantee didactic success if they do not correlate with appropriate educational activities. This task is fulfilled by the correctly chosen methods of teaching (Skibińska 2008, p. 103), which are described as leading the way to reach the goal. In educating adults, teaching and learning methods play an important role. Andragog mainly uses methods which support the

---

Poland. Sometimes there are opposite propositions in the group from different areas of interest e.g. digital graphics, converting music from CD to Mp3 or text editing.

<sup>8</sup> An example confirming this tendency are the results of the research carried out at the UTW in Cieszyn, where students, given the possibility to choose their learning mode, indicated: traditional lessons (group and a teacher) – 44 people (88%), internet-only lessons – 2 people (4%), mixed (part of the material realized in a traditional way and part by internet) – 4 people (8%), which indicates that the experience previously gained determines one's preferences with studying.

<sup>9</sup> Some students of the UTW in Cieszyn are still professionally active, and due to their participation in UTW lectures, they are still able to function professionally thanks to improved computer skills or foreign language knowledge.

independent work of students. Due to these stimulating and interactive work methods, the activity of the students is developed and not simply knowledge transmission. Activation methods include: various discussion types, problem solving (brainstorm, situational method, interactive games, *case study*), practical methods (working by instruction, exercises), and curricular teaching (Matlakiewicz, Solarczyk-Szewc, pp. 116–131).

It seems that among the four elementary groups of teaching methods, observation, action and problem solving, the most effective methods is oral teaching, a situation which has its roots in the educational biography of seniors. This does not mean that they are not open to new learning methods or new didactic sources. Learning foreign languages or participating in biographical lectures presents learners with a new challenge, both in the learning method through role-play, through triggering emotions, as well as in the area of new didactic sources such as computers and internet. At the same time it is important that when the choice of teaching methods is made, potential resources of the older generation should also be considered, for instance in biographies, as well as the limitations connected with changes in the cognitive processes: perception (sight, hearing, touch, and smell), attention (conscious and subconscious), memory (visual, kinetic, audial, long-term, short-term, mechanical, and logical) and thinking (image, words, logic, sensory).

These given methods were combined with activating methods based on new media, group work, reading, life reflection, and dialogue. For instance, among the unique methods of work with seniors, learning from life history has become more popular. These methods and research in reality are more and more used in a few scientific institutions in Poland such as the University of Lodz (andragogy and Social Gerontology Institute), the University of Wroclaw (Institute of Pedagogy) and the Higher Administration School in Bielsko-Biala (Human Science and International Studies Department). In order to understand this method, it is worth studying the case on the basis of a description from the lectures *Learning from life and biography* realized in the framework of “@ktywny Senior” project in Wroclaw. The aim of this study was to create the possibility of exchanging life experiences, recalling events from the past and life experiences, looking at one’s own experiences from a completely different and new perspective, and providing stories from the past with new meanings. The groups in which these lectures were conducted consisted of 10 people, and touched upon topics including the following issues: “my invisible environment”, “the journey of my life”, “childhood memories”, “adulthood time memory”, “the meaning of friendship in adult life”, “emotionality and its meaning”, “the image of my family home” and “searching for the recipe for longevity”. Each of the lectures began with an introduction which encouraged the further activity of the participants. Among the didactic sources which supported the lectures were photographs, written memories, and cards with unfinished sentences which initiated discussions by the participants of the project. According to the author of the lecture: “participants appreciated the value of sharing their own experiences, which can be so different. In andragogy, they are given

the status of a personal teacher, and their educational potential is recognized[...]. Under the influence of the stories told and heard, all the participants learn from each other. Listening to opinions on the chosen topic often shows different perspectives, which help to evaluate one's own experiences. It is helpful in building one's own life summary, especially when it seems to be negative" (Wnuk-Olenicz 2012, pp. 47–48). The issues of a lifetime in senior education are touched upon by J.K. Wawrzyniak (2013, pp.59–62) who encourages writing autobiographies in the book *Autobiography as a creative challenge. Scenarios of biography lectures*.

It should be underlined that the trend called biographical didactics was intensively developed in Poland by O. Czerniawska, E.Dubas, E.Skibińska, J. Stelmaszczyk, M.Sulik, who were inspired by the work of the Italian scientist D.Demetrio. Many social gerontologists who prefer to use quantitative research state that this is the most promising scientific-didactic trend. Among the subject literature in this matter, the works of the biography research center in Łódź (Dubas, Świtalski 2011a,b) are especially interesting.

Apart from the above-mentioned methods, traditional educational solutions should be mentioned, and these are auditoria forms. Readings, pre-lectures, scientific lectures organized by cultural institutions, senior clubs, museums, regional chambers, and libraries, and are popular in both big cities as well as in smaller towns or in the countryside. Moreover, the experience of such cultural centers in Poland shows that there is a growing popularity of author meetings and lectures to which people of interest, most often travelers, politicians, social activists, scientists, artists, and writers, are invited. One of the target groups which is especially active in this kind of meetings are seniors (Aleksander 2009, pp. 193–195).

Apart from the new courses which are further described in the next subsection, the most popular among seniors is foreign language learning. There are papers that touch upon the problem of the methodology of teaching foreign languages to seniors (Jaroszewska 2013). The acquisition of a foreign language demands long and difficult study; moreover the process is extremely difficult because of the ephemeral character of the lexical resource. In the case of seniors, the study in this area is determined by the need to improve communicativeness during journeys abroad, in correspondence with friends who live abroad, or it is a result of other interests. During the organization of foreign language lessons for seniors, it is important to determine the level of linguistic competence before beginning to teach in particular groups (just as in the case of exercise in the matter of computers and internet use) in order to determine the students' level of advancement. Among Polish seniors, most groups are of low or very low linguistic competence. Most often during language courses the following types of competence are developed: developing vocabulary, the ability to use grammar structures, understanding text, understanding phrases heard, and building utterances. The authors and the teachers of senior language courses underline that among the main elements which favor the adjustment of language courses to the needs and abilities of seniors, special attention should be paid

to: the choice of textbook with consideration given to the accessibility of the content for people with damaged sight, which includes printing the written text in a bigger font and using more visible illustrations. Moreover, the meetings should take place at an appropriate tempo that would consider the perception features of the participants, and also the constant revision of material to ensure that it is learnt well (Gulanowski 2012, pp.65–72).

In 2012, via the Ministry of Culture and National Heritage, on the last weekend of September, seniors (free of charge or for a symbolic fee) were able to take advantage of the programs of the cultural institutions in the whole country. The *60+ culture* was participated in by over 200 facilities in Poland. Programs dedicated to seniors were various – from free entrance to organized meetings, lectures, and guided tours. Similar forms of education for seniors are becoming more popular in Poland thanks to, for instance, cinemas and cultural centers, which are open to the oldest clients by offering free or reduced-charge entrances.

In the choice of teaching methods, it is necessary to consider the specifics connected with old age, so with the cognitive processes, such as sight, hearing, mobility, memory, verbal, and manual abilities (Skibińska 2008, p. 103).

An example of the variety of educational undertakings for seniors may be the program of the University of the Third Age in Cieszyn:

- Lecture meetings (every fortnight) – lecture methods, most often supported by didactic sources in the form of multimedia presentations or realia provided by the lecturers;
- Linguistic meetings, regardless of the level of advancement and are dominated by conversations, and exercises with texts and a workbook.
- Sports exercises (Nordic walking, fitness, aqua aerobics, yoga) with the use of instruction methods and independent exercising;
- Art lectures (painting, ceramics) based on independent, expressive activities;
- Tourism lessons – journeys, meetings with nature and a chance for spiritual and emotional development, completed by a description or conversation outdoors;
- Health lessons realized within the project co-financed by the county, based on giving and activating methods (e.g. lectures on healthy nutrition);
- Computer classes carried out with traditional methods (lecture, instruction, independent exercises, and problem solving) and innovative (*blended learning* – self-education in the framework of free online courses e.g. on the Polish National Bank Platform; communication with lecturer in a synchronous way (e.g. Skype) or non-synchronously (*e-mail*) (Tomczyk 2010, pp. 52–61).

In summarizing the teaching methods and forms it should be underlined that by making a choice, one should be aware of the variety of needs that seniors have. People in late adulthood are different from each other in a much more significant way than at the early old age, which is confirmed by research results presented by developmental psy-

chologists (Bee 2004). An individualized approach and the creation of small educational groups appear to be the optimal method, especially for the more difficult areas such as foreign languages and new media use.

### **New media in educating seniors**

During the different stages of history, different types of transferring and gathering information dominated. People who wanted to adjust to the latest conditions in order to take part in interpersonal communication, had to master the media – they had to learn the communication code (speech and writing), learn about the possibilities of technical devices (telegraph, phone, radio, television) and – currently – gain competences in the area of information technology. The difficulty for seniors to adapt to the new, directly and indirectly informational space appears in the form of low usage of the various types of microelectronic devices. Old media, such as radio, the press, and television, are their natural environment for discovering information, whereas the personal computer with internet access, multifunctional mobile phone, or other mobile multimedia devices (smartphones, tablets) are hardly ever used and then mainly by those who are aware of the advantages they offer. Progress is determined by new technologies, requiring modern people to possess competences in the area of using objects with an everyday use, including devices with access to the global web.

New media has irrevocably changed the way both social groups and individuals function. This obvious statement gains a new meaning when one considers the positive and negative results of this process connected with the psycho-social operation of particular age groups in an information society. One of the unfavorable results of digitalization is the phenomenon of digital exclusion, which is apparent in the oldest social age groups.

Features of Polish digital society have been evolving for years, and the share of older people using the new media is constantly growing. Nevertheless, in comparison with other societies in the European Union Polish society finds itself in an unfavorable position. Originally, the internet was created by young people for the younger generation; thus, the percentage of senior people is still at a low level. The specifics of the use of this complex device, the computer, a lack of knowledge about the possibilities of using new media in everyday life, an aversion to technical novelties, and other limitations e.g. economic, have given birth to a new type of exclusion – namely the division of societies into *online* people and people excluded (and those who exclude themselves) from the information society – *offline* group. Table 19 shows the percentage of particular age groups in Poland as regular Internet users.

**Table 1. People regularly using a computer**

Age Groups	2008	2009	2010	2011	2012
	% of the overall				
Overall	49.9	55.3	57.7	60.0	60.2
16–24	89.8	93.5	95.1	96.5	95.2
25–34	73.3	80.7	83.7	86.7	88.1
35–44	55.4	64.2	68.7	72.4	76.0
45–54	39.2	45.4	49.1	49.1	51.3
55–64	23.1	26.3	27.4	31.6	31.5
65–74	5.7	6.9	8.8	10.8	14.9

Source: GUS 2012, p. 94.

In order to prevent digital exclusion and to improve competences in the area of information technologies within last few years, a range of educational actions have been taken such as those at the aforementioned universities of the third age, in the framework of which courses at various levels of advancement were introduced. One extremely important stimulant for education in the area of new media in Poland has been the use of various funds (Human Capital – PO, KL, Civil Initiative Fund – FIO, grants from the ministry of Labor and Social Policy for pro-senior organizations) which support education, due to which projects have been financed aiming at the improvement of the knowledge and skills which are crucial in new media use. Most often, in the framework of computer courses financed with grants, older people were trained in accordance with a standard which ensures the confirmation of the competences learned by external tests e.g. the European Computer Driving License ECDL. The level of basic courses was connected with trends set by ECDL E-Citizen standards, whereas the lower-intermediate were set in conjunction with the ECDL Core standard. Considering the specifics of these external tests such as the above-mentioned ECDL, it should be underlined that for older people who are only beginning to learn about new media, these are extremely complicated exams. The difficulty in the positive verification of knowledge and skills is connected with the short time allowed for completing the test, an insufficient level of technical skill, and the inability to read the test questions with comprehension, which is correlated with a reduced ability to use technical vocabulary.

The teaching of new media, realized by various non-government institutions, senior clubs, UTWs, volunteer fire brigades, and women's organizations, are supported by a growing number of didactic sources – namely – books, interactive tablets, multimedia scripts, internal tests, internet platforms, and convergent devices. Currently, more than

30 books exist on the Polish market which are dedicated to seniors and describe how to use a computer with Internet access. Moreover, for two years the periodical “Komputer Świat Senior” has been published, which describes the latest software and technical solutions that may be used by generation 50+.

Non-system solutions include a few examples that allow one to understand the specifics of learning and teaching seniors in the area of new electronic media. For instance, in the framework of the National Program for the benefit of social activity of older people, *The foundation for Jagiellonian University realized the project “mobility in the third age”*, in the framework of which a few UTWs students were trained in the area of tablet and smartphone use, as an alternative to the traditional computer with internet access. The project included over 300 people who took part in plenary lectures, whereas over 60 people had the opportunity to get to know the mobile devices by being active users during their 12 hours of training. The aim of the project was to illustrate practical examples of mobile device use to fulfill needs in everyday life.

Another solution that ensures the participation of seniors in the area of new technologies are courses organized by non-government organizations and volunteers. For instance, since 2012, in the framework of *Digital Poland of Equal Chances* 2614 educators were trained and who now work to prevent the phenomenon of digital exclusion. Within the last few years, this has been the biggest event concerning the intensive preparation of people to educate adults who are considered digitally-excluded. Thanks to the 2-day training, volunteers who work in various branches, not necessarily connected with education, become new media educators. They offer courses free of charge in local communities in Poland that concern information classes for adults, including seniors. The number of participants is yet to be estimated, but it is stated that these activities concern several thousand people who are considered digitally-excluded. Educating such a large group of adult educators is surely one of the more important events on the educational map of Poland and Europe in 2012. It should be underlined that the *Digital Poland of Equal Chances* program won first prize during the Information Society Summit organized in Geneva by the International Telecommunication Union in the category *Capacity building*, which is concerned with building digital potential. This type of educational activity is a phenomenon unknown until now, since in the branch of digital education, the universities of the third age, non-government organizations, and commercial firms had taken the lead (Hofman, Tomczyk 2013).

In Poland, there are more commercial solutions in the matter of senior e-education. For instance, on the *Edu50plus* platform, there are four courses available: *Memory training for seniors*, *Useful computer graphics course*, *Prepare for mature exam* and *Internet course in creative writing*. The website authors underline that: “the intention of edu50plus was to reach mature women and break the myth that distance education, modern technologies, and the internet are unavailable to them. We assure that in the case of any dif-

difficulties or doubts, the great and friendly trainers will make the *e-learning* training an incredible journey” (Edu50plus). The cost of participation in the training is 300 PLN.

Seniors who become familiar with new media underline that in the case of undertaking educational activities, they have a range of doubts which influence the didactic process. The most often mentioned barriers are as follows (Wierzbicka 2008, p. 58).

- Worries about damaging the electronic medium – most often derived from a low awareness of using the device and its worth. Regardless of common accessibility and decreasing computer prices, the majority of people are worried that they will damage the equipment beyond repair and would have to pay for the damage.
- Worries derived from a lack of knowledge about the equipment’s features and their potential applications, which may determine an increase in the quality of life of the people who use it. Very often this phenomenon is observed among adults and reflects a decreasing curiosity towards technical novelties. These worries are connected with an overwhelming fear of the unknown. Due to a lack of knowledge about computer use, the potential user, by seeing its virtual, complex nature, assumes difficulties in using the equipment. Thus, it is crucial to break this view of electronic devices;
- Incomprehension of the instructions and messages that appear during operation – the situation is a result of too little practice, which prevents the formation of certain habits which are typical for a particular piece of software. This fact is connected with the preparation of popular applications for users who, when using new media, demand friendly software;
- An overload of unintelligible vocabulary, typically the specific technical vernacular used by the lecturer or that occurs in the subject literature, which discourages further education or hinders the acquisition of certain skills. Specialist terminology and the need to move around a new, unknown space, leads to the fact that people are not able to understand the command or sense of the knowledge;
- A mistaken image about computers and the internet and what they are capable of – there is also a decrease in belief about the incredible functions which microelectronic devices have and this image is multiplied by literature and movies;
- Barriers connected with a foreign language – specialist software or websites about a certain issue are most often in English which makes it impossible to make best use of the applications and knowledge systems the internet presents;
- Lack of ability to properly use the software – this is especially observed among users of a low level of advancement;
- Fear of humiliation and being discredited in front of other people. This is one of the most common problems which lead to the withdrawal of potential users of new technologies from participation in organized training. The situation occurs when a person does not have support from the those around them or is even discouraged

from education and when the participants of the course do not know each other very well, and their skills are at a different level;

- A lack of belief in one's own abilities derived from earlier educational failures.

In order to present the ideal educational model of older people, it is difficult to indicate the only right solution since there is no such solution in the process of educating seniors in the area of information technology. During the preparation of the proper model, the most important thing to consider is the awareness of the educator who presents the lectures concerning the specifics of the bio-psycho-social operation of seniors and the possibility to choose participants in a chosen group with consideration given to the homogeneity of their individual features and their level of advancement in computer use. Moreover, the educators should adjust the learning and teaching style to the preferences of adults.

To summarize, creating the new methodology of teaching seniors through generating a homogenous model is a complex process which demands the consideration of many variables. Additionally, some factors included in the model have many vague elements which should be clearly determined (e.g. learning and teaching styles). Thus, the question is whether it is reasonable to continue the search for the ideal state. This question seems to be valid, when in the education market there are more and more institutions dedicated to educating seniors in the area of information technology, and lecturers work in accordance with the intuition and experience they have gained during lessons with other age groups. Currently, in Polish andragogy and gerontology literature, there is a lack of unambiguous solutions in the area of detailed methodologies, despite the development of the information society, progressive demographic changes, and the development of senior education. Creating concepts of senior teaching models in the area of IT and research on the relationship between their factors put knowledge in order, whereas its integration favors the improvement of effectiveness in gaining skills and knowledge.

## **Self-education**

Currently, in the area of teaching adults, what is more often underlined is the role of non-formal and incidental education. This is a result of the rate of change that determines the adjustment of a person to their surrounding reality. Moreover, andragogy environments more freely postulate the change of paradigm from teaching to learning. Learning in this case is not only a necessity, but becomes an internal part of everyday functioning which stimulates constant development (Konieczna-Woźniak 2010, p. 67) during the realization of professional and family goals or the fulfillment of one's own dreams and hobbies.

Just a few years ago, adult self-education was an issue poorly developed in Polish andragogy literature, except for a few theoretical papers and research connected with people in early and late adulthood (Semków 1986). Despite the fact that all the reports of UNESCO indicate the necessity of self-education as a crucial element in discovering reality,

the analysis of the adult education system was limited to underlining the significance of the learning process. The term senior self-education did not appear in the subject literature. The characteristics of practice and theory were limited to institutions that performed tasks in the form of lectures, seminars, and academic exercises conducted by universities of the third age, country universities, open universities, local clubs, and associations.

Currently, self-education in adulthood, regardless of its early or late stage, is becoming a basic element of the lifelong learning strategy. Self-education, treated as the aware, intentional, and independent gaining of knowledge and skills, began to be treated from a theoretical standpoint in Poland because of such people as: W. Kozłowski, A. Dygasiński, K. Prószyński, H. Radlińska, L. Krzywicki, K. Wojciechowski, I. Jurgielewiczowa, W. Okiński, F. Urbańczyk, A. Kamiński, C. Maciarz, J. Kuźma, S. Pacek, W. Prokoپیuk, J. Półturzycki, J. Semków (Matlakiewicz, Solarczyk-Szwec 2009, pp. 133–135).

The most important role in senior self-education, just like as in the case of traditional teaching, is fulfilled by a wide range of technical and social abilities which aim to improve the level of knowledge and the acquisition of new competences. This may take place due to (Matlakiewicz, Solarczyk-Szwec 2009, pp. 135–136):

- New media included in the richness of the internet web, where on many themes, websites, discussion forums, websites with tutorial videos one may have access to a range of precious information;
- Lectures and articles in the professional literature (also branch periodicals) gained in the framework of querying one's own home library resources;
- Solving incidental problems in everyday life.

Senior self-education may be supported or led by significant people, e.g. teacher or lecturer of UTW. Moreover, using books such as for learning a foreign language is a certain form of indirect self-education, since learners follow the path marked by the author of the book. It is self-education, as the last type of auto-education that demands intellectual maturity and the ability to perform a profound analysis of the surrounding reality and to order data in a systematic and structured way. Appropriate self-education is the most difficult type of auto-education which is gained during the whole lifetime and it begins in elementary school through the activation of self-control and self-evaluation by significant people.

## **Principles of education**

In the process of teaching seniors, their teachers should consider certain standards of action which in didactics are called the principles of education. There is a range of typologies of educational principles, but the ones presented below are, according to the authors, the most important. These are the principles chosen and adjusted to the needs of teaching seniors by Suchy (2007), Skibińska (2008), Matlakiewicz and Solarczyk-Ambrozik

(2009) and completed by the authors of this text with the first four. It seems that the first four principles on the list are in adult didactics, with a special consideration of the education of older people, a foundation and they indicate the specifics of learning in old age.

**The principle of individualization** is based on the consideration of the individual features of the participants to the educational process in the adjustment of teaching methods, against needs and experiences. The principle is connected with objectifying the learning process by giving each of the seniors the basis for optimal learning and for becoming their own education manager.

**The principle of independence**, extremely underlined in adult didactics, refers to the assumption that the more mature the person, the more independence and autonomy he/she needs.

**The principle of utility** refers to the need of seniors to learn what is useful. Utilitarian knowledge, skills and competences, which may be used every day, determine the procedure of choosing the content. In the case of older people, the utility of knowledge is most subjective and derives from the individual need, is a consequence of choosing content adjusted to the diagnosed needs of seniors, most often connected with other activities from many areas of life.

**The principle of frequent reference to life experience** of seniors allows them to use their experience as a significant source of knowledge by making them aware of its value. The best example of this principle is in the biographical methods, where the history of the student's life is an excellent source of knowledge.

**The principle of illustration** is based on making references to terms, objects, and situations that are relevant to seniors. It is a certain assurance of the optimal presentation of content with reference to modern didactic sources.

**The principle of content structure** assumes shaping in the mind of an adult learner integrated knowledge through the proper choice of teaching content. Content structures should be constructed in such a way that will make it possible to cover all of the content during self-education.

**The principle of high quality education** derives from a serious approach to education, in which the role of learners is taken by seniors with their experiences and expectations. Education is an activity in which seniors involve themselves through their own choice, with inner motivations to reach success. This principle reinforces the perception of education in senior age as an activity just as valuable as formal education.

**The principle of temporality** derives from the delayed reaction time of seniors that comes with age. This principle suggests the need to dedicate more time to all the activities performed by seniors and to slow down the tempo of work, adjusting to the needs of the learners. This principle refers greatly to issues which demand good hearing, good vision, and quick reactions and the processing of stimuli, thus lectures connected with new media, foreign languages, and motor activity.

**The principle of consideration of physical and health condition** of seniors means taking special care of educational conditions (safety during lectures) and taking action in accordance with the principles of intellectual work hygiene and creating educational comfort through the maintenance of the appropriate atmosphere.

**The principle of aware and active participation** is realized on the basis of the method in which the senior makes attempts to independently determine a solution to any given problem based on their own information sources. In this case, the teacher aims at encouraging activity among seniors (e.g. by presenting problems to be solved independently); moreover, the teacher creates the conditions for co-operation in the group. This is connected with the principle of independence, since seniors build working methods by completing activities on the basis of problem-solving learning and independence with the help of the educator.

**The principle of adjustment of the language to the audience** is especially important when people are taught who wish to gain certain information and skills. During education on using a computer the language should be illustrative, and not overloaded with recondite terminology. In the case of lectures of a specialist character e.g. psychology, the level of language abstraction should be adjusted to the cognitive capacity of seniors. It has been observed that spontaneity and natural behavior, including the concrete-illustrative presentation of topics among UTW students, is better received than typical academic lectures with the use of subject terminology.

**The principle of considering emotional influences on the learning process.** Emotions are considered the main factor which favor and hinder activity. It may happen that during education, seniors feel some sort of discomfort. This may be the result of unfavorable experiences at earlier stages of their educational path, e.g. contact with an unprofessional educator. Without doubt adequate forms of teacher contact with an adult learner, including teaching culture, determine the positive approach of seniors towards the didactic process.

**The principle of general integration** derives from the need to perceive the world not so much in the context of distinguished subjects or, like at a UTW, area of interest,

but from problems that a person faces. The senior education process should therefore present the best possibility to integrate knowledge gained in life, including the variety of dependencies and connections between the content of teaching which depict aspects of the surrounding reality.

**The principle of error probability** derives from the lack of possibility to plan and realize didactically-ideal activities. The didactic process is extremely dynamic. Additionally, each of the participants is characterized by educational habits and dissimilar relationships within the group. Provided that the educator cannot anticipate everything, the unofficial part of the lesson should be planned which is often unwanted from an organizational point of view. People who present exercises and lectures for seniors are not able to foresee all the consequences connected with activities. However, what is most welcome is the creation of the best conditions for education, the application of methods across the spectrum, and encouraging reflection on the activities in order to anticipate errors.

The above-mentioned principles of education are derived from traditional didactic principles and are only a selection of principles which reflect the specifics of teaching seniors. The development of principles of education based on further analyses and research aiming at improving the teaching effectiveness seem to be necessary.

## Conclusion

Among the earlier-mentioned principles of education, it is worth mentioning that the learning itself, treated as the acquisition of knowledge and skills, is an issue significantly correlated with the stimulation of seniors to maintain their independence and supporting them through education with the simultaneous consideration of extended personal development. Goals constructed in this way refer to the specifics of senior education, and thus to the detailed methodologies which constitute a set of principles typical for andragogy and geragogy.

When analyzing the methodology of teaching seniors, it should be considered that it is a relatively new research area as evidenced by the insufficient number of guides to methodology which give instruction on how to teach seniors new media, foreign languages, art, the humanities, and social subjects. Many educational activities (e.g. realized in the framework of grant programs) and regular lectures e.g. at the above-mentioned universities of the third age led by teachers who base their activity only on intuition and experience from traditional school didactics. All in all, one can easily justify the preparation of detailed methodologies in Poland, dedicated to the growing number of people who support senior education, since this will lead to the constant improvement of teaching quality at the final developmental stage of life.

## Bibliography

- ALEKSANDER T., 2009, *Andragogika. Podręcznik akademicki*, Instytut Technologii Eksploatacji, Radom-Kraków.
- BEE H., 2004, *Psychologia rozwoju człowieka*, Wydawnictwo ZYSK I SK-A, Poznań.
- COSTA P. T., McCRAE R. R., 2006, *Osobowość Dorosłego Człowieka*, Wydawnictwo WAM, Kraków.
- DUBAS E., 2009, *Etapy dorosłości i proces kształcenia*, [w:] A. Fabiś, B. Cyboran (red.), *Dorosły w procesie kształcenia*, Wydawnictwo Wyższej Szkoły Administracji w Bielsku-Białej.
- DUBAS E., ŚWITALSKI W. (red.), 2011, *Uczenie się z (własnej) biografii*, Wydawnictwo Uniwersytetu Łódzkiego, Łódź.
- FABIŚ A., 2005, *Edukacja seniorów – odpowiedź na wymagania współczesności*, [w:] A. Fabiś (red.), *Unowocześnianie procesu kształcenia dorosłych. Wyzwania Współczesnej Edukacji Dorosłych* (tom 2). Wydawnictwo Górnośląskiej Wyższej Szkoły Pedagogicznej im. Kardynała A. Hłonda. Mysłowice–Zakopane.
- GULANOWSKI M., 2012, *Edukacja językowa seniorów*, [w:] E. Jurczyk-Romanowska (red.), *Trzecia zmiana. Andragogiczne rozważania na temat projektu @ktywny senior*, Dolnośląski Ośrodek Polityki Społecznej, Wrocław.
- HOFMAN D., TOMCZYK Ł., 2012, *Przygotowanie do roli edukatora osób wykluczonych cyfrowo na przykładzie projektu Latarnicy Cyfrowej Polski*, „Rocznik Andragogiczny”, ITEE, Radom.
- JAROSZEWSKA A., 2013, *Nauczanie języków obcych seniorów w Polsce. Analiza potrzeb i możliwości w aspekcie międzykulturowym*, Wydawnictwo Impuls, Kraków.
- KNOWLES M., HOLTON E., SWANSON R., 2009, *Edukacja dorosłych*, PWN, Warszawa.
- KOČIANOVÁ R. (red.), 2013, *Analysis and comparison of forms and methods for the education of older adults in the V4 countries*, Univerzita Karlova v Praze, Filozofická fakulta, Praha.
- KOČIANOVÁ R., 2012, *Personální řízení – teoretická východiska a vývoj*, Grada, Praha.
- KONIECZNA-WOŹNIAK R., 2010, *Dorosłość człowieka jako źródło jego autoedukacji*, [w:] A. Fabiś, A. Stopińska-Pajak (red.), *Uczący się dorosły w zmieniającym się świecie*, Wydawnictwo Wyższej Szkoły Administracji w Bielsku-Białej, Bielsko-Biała.
- KWIATKOWSKA H., 2008, *Pedeutologia*, Wydawnictwa Akademickie i Profesjonalne, Warszawa.
- MATLAKIEWICZ A., SOLARCZYK-SZEWC H., 2009, *Dorośli uczą się inaczej*. Centrum Kształcenia Ustawicznego, Toruń.

- SKIBIŃSKA E., 2008, *Proces kształcenia seniorów*, [w:] A. Fabiś (red.), *Aktywność społeczna, kulturalna i oświatowa seniorów*. Wydawnictwo Wyższej Szkoły Administracji w Bielsku-Białej, Bielsko-Biała.
- SUCHY S., 2010, *Edukacja dorosłych pracowników i bezrobotnych*, Wydawnictwo Difin, Warszawa.
- TOMCZYK Ł., 2011, *Andragog jako mentor i przewodnik seniorów po z informatyzowanym świecie*, [w:] W. Korzeniowska, A. Murzyn, H. Lukášová-Kantorková (red.), *Nauczyciel – wartości – świat*, Impuls, Kraków.
- TOMCZYK Ł., 2012, *Wybrane determinanty kształcenia seniorów w dziedzinie nowych mediów na przykładzie Cieszyńskiego Uniwersytetu III Wieku*, [w:] E. Dubas, A. Wąsiński (red.) *Edukacyjna przestrzeń starości*, Wydawnictwo Śląsk, Katowice.
- WAWRZYŃIAK J. K., 2013, *Retrospekcja i adaptacja. Biografia jako możliwość samorozwoju w okresie dorosłości*, [w:] K. Lasocińska, J. K. Wawrzyniak, *Autobiografia jako twórcze wyzwanie. Scenariusze warsztatów biograficznych*, Żak, Warszawa.
- WIERZBICKA A., 2008, *Technologie informacyjne – wsparcie czy przeszkoda*, [w:] A.W. Mitas (red.), *Technologie informacyjne w edukacji policjantów*, Centrum Szkolenia Policji, Legionowo.
- WNUK-OLENICZ M., 2012, *Warsztaty „Uczenie się z życia i własnej biografii”* [w:] E. Jurczyk-Romanowska (red.), *Trzecia zmiana. Andragogiczne rozważania na temat projektu @ktywny senior*, Dolnośląski Ośrodek Polityki Społecznej, Wrocław.

## Web pages

Edu50plus pozyskano z: [www.edu50plus.pl](http://www.edu50plus.pl)



Marcin Muszyński

# 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.

---

<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

---

<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, forestry 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 another. 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-

---

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.

## Bibliography

- BASS S., CARO F., CHEN Y., 1993, *Achieving a productive aging society*, Auburn House, Westport CT.
- BUKOWSKA G., 2011, *Aktywność zawodowa osób starszych*, [w:] G. Bukowska, G. Kula, L. Morawski (red.), *Ryzyko ubóstwa osób starszych*, CeDeWu, Warszawa.
- CAIN L. D. JR., 1964, *Life course and social structure*, [w:] R. E. L. Faris (red.), *Handbook of modern sociology*, Rand McNally, Chicago.
- DUBAS A., 2008, *Kategoria wiekowa 50+. Charakterystyka rozwojowa i aspekty edukacyjne*, [w:] E. Dubas, J. Pyżalski, M. Muszyński, J. R. Pavel (red.), *Wspieranie rozwoju bezrobotnych 50+. Doświadczenia z projektu Adults Mentoring*, Wydawnictwo Uniwersytetu Łódzkiego, Łódź.
- EUROPEAN COMMISSION, 2002, Report requested by the Stockholm European Council: *Increasing labour force participation and promoting active ageing*, Office for official publications of the European Communities, Luxembourg, 6519/02 ECOFIN 72, SOC 95, Brussels.
- GUTOWSKA A., 2008, *Diagnoza potrzeb życiowych osób po 50 roku życia*, [w:] E. Dubas, J. Pyżalski, M. Muszyński, J. R. Pavel (red.), *Wspieranie rozwoju bezrobotnych 50+. Doświadczenia z projektu Adults Mentoring*, Wydawnictwo Uniwersytetu Łódzkiego, Łódź.
- HERZOG A. R., KAHN R. L., MORGAN J. N., JACKSON J. S., ANTONUCCI T. C., 1989, *Age differences in productive activity*, „Journal of Gerontology”, nr 44.
- HOLZER J.D., 1999, *Demografia*, Polskie Wydawnictwo Ekonomiczne, Warszawa.
- KAMIŃSKI A., 1978, *Studia i szkice pedagogiczne*, Wydawnictwo Naukowe PWN, Warszawa.
- KLONOWICZ S., 1986, *Starzenie się ludności*, [w:] S. Rudnicki (red.), *Encyklopedia seniora*, Wiedza Powszechna, Warszawa.
- KOCIANOVÁ R., 2012, *Personální řízení – teoretická východiska a vývoj*, Grada, Praha.
- LANGER M., 2008, *Rynek pracy w obliczu starzenia się ludności Polski*, [w:] J. Kowaleski, P. Szukalski (red.), *Starzenie się ludności Polski. Między demografią a gerontologią społeczną*, Wydawnictwo Uniwersytetu Łódzkiego, Łódź.
- MALEC M., 2011, *Poszukiwanie recepty na starość – wyzwaniem dla edukacji dorosłych. Refleksje nad uczeniem się starości przez całe życie*, [w:] M. Malec (red.), *Edukacyjne, kulturowe i społeczne konteksty starości*, Oficyna Wydawnicza ATUT – Wrocławskie Wydawnictwo Oświatowe, Wrocław.
- MALEWSKI M., 2010, *Od nauczania do uczenia się. O paradygmatycznej zmianie w andragogice*, Wydawnictwo Naukowe Dolnośląskiej Szkoły Wyższej, Wrocław.
- MUSZYŃSKI M., 2008, *Diagnoza potrzeb pracodawców wobec pracobiorców 50+*, [w:] E. Dubas, J. Pyżalski, M. Muszyński, J. R. Pavel (red.), *Wspieranie rozwoju bezrobotnych 50+. Doświadczenia z projektu Adults Mentoring*, Wydawnictwo Uniwersytetu Łódzkiego, Łódź.
- Osoby niepełnosprawne oraz ich gospodarstwa domowe 2002, 2003*, Główny Urząd Statystyczny, Warszawa

- PEREK-BIAŁAS J., TUREK K., 2011, *Starszy pracownik z punktu widzenia pracodawcy*, [w:] J. Mucha, Ł. Krzyżowski (red.), *Ku socjologii starości. Starzenie się w biegu życia jednostki*, Wydawnictwo AGH, Kraków.
- PIERSON CH., CASTLES F. G., 2007, *The welfare state reader*, Polity Press, Cambridge.
- Prognoza ludności na lata 2008-2035*, 2009, Główny Urząd Statystyczny, Warszawa.
- RICHERT-KAŻMIERSKA A., STANKIEWICZ K., 2013, *Kompetencje pracowników 55+ w opinii pracowników z młodszych grup wiekowych*, „E-mentor”, nr 1 (48).
- Rocznik Demograficzny 2012, 2012e*, Główny Urząd Statystyczny, Warszawa.
- SZATUR-JAWORSKA B., BŁĘDOWSKI P., DZIĘGIELEWSKA M., 2006, *Podstawy gerontologii społecznej*, Oficyna Wydawnicza ASPRA-JR, Warszawa.
- SZUKALSKI P., 2008, *Aktywność zawodowa i plany związane z wiekiem przejścia na emeryturę*, [w:] P. Szukalski (red.), *To idzie starość. Postawy osób w wieku przedemerytalnym. Raport z badań*, Instytut Spraw Publicznych, Warszawa.
- TECHNICZEK D., 1965, *O potrzebie badań w dziedzinie gerontologii społecznej w Polsce*, „Studia Socjologiczne”, nr 1.
- TECHNICZEK D., 1968, *O kierunkach badań w dziedzinie socjologii i psychologii społecznej wieku starszego*, „Studia Socjologiczne”, nr 2.
- TRZECIAK W., DROGOSZ-ZABŁOCKA E. (red.), 1999, *Model zintegrowanego poradnictwa zawodowego w Polsce*, Warszawa.
- URBANIAK B., WIECZOREK I., 2007, *Zarządzanie wiekiem pracowników*, [w:] B. Urbaniak (red.), *Pracownicy 45+ w naszej firmie*, Program Narodów Zjednoczonych ds. Rozwoju (UNDP), Warszawa.
- WALKER A., 2006, *Active ageing in employment: its meaning and potential*, „Asia Pacific Review” Vol. 13, No. 1.
- WIŚNIEWSKA-ROSZKOWSKA K., 1964, *Medycyna w walce ze starością*, Wydawnictwo Lekarskie PWZL, Warszawa.
- WŁODARCZYK M., PALUSZKIEWICZ M., 2011, *Formy prawne wyrównywania szans osób w wieku 50+/45+ na rynku pracy w Polsce*, [w:] B. Urbaniak, J. Wiktorowicz (red.), *Raport z analizy programów skierowanych do osób 50+ zrealizowanych w Polsce w latach 2004-2009*, Wydawnictwo Biblioteka, Łódź.

### Legal acts

- M. P. 2012, poz. 642, *Uchwała Nr 137 Rady Ministrów z dnia 24 sierpnia 2012 r. w sprawie ustanowienia Rządowego Programu na rzecz Aktywności Społecznej Osób Starszych na lata 2012–2013*.

### Web pages

- EUROPA 2020. Strategia na rzecz inteligentnego i zrównoważonego rozwoju sprzyjającego włączeniu społecznemu, pozyskano z: [ec.europa.eu/eu2020/pdf/1\\_PL\\_ACT\\_part1\\_v1.pdf](http://ec.europa.eu/eu2020/pdf/1_PL_ACT_part1_v1.pdf)

## Recenzje / Reviews

**Remigiusz J. Kijak, Zofia Szarota:  
*Starość. Między diagnozą a działaniem,*  
Centrum Rozwoju Zasobów Ludzkich, Warszawa 2013.**

Recenzowana książka, jak sam jej tytuł wskazuje, obejmuje zakresem swoich treści problematykę gerontologiczną i nieco wbrew tytułowi nie ma charakteru poradnika metodycznego. Autorzy skoncentrowali się głównie na opisie procesów starzenia się w Polsce, specyficze starzenia się jednostkowego, a przede wszystkim w perspektywie społecznej. Praca zawiera także postulaty do działań w skali makro (np. w rozdziale II Wsparcie społeczne i polityka społeczna wobec późnej dorosłości i starości) i do pracy indywidualnej (np. rozdział III *Specyfika pracy socjalnej z seniorami – wybrane aspekty*). Jest wartościową publikacją, poszerzającą rodzime zbiory biblioteki gerontologicznej.

Pierwsze trzy rozdziały publikacji są autorstwa Zofii Szaroty. Książkę otwiera rozdział poświęcony demograficznym i społecznym aspektom starzenia się społeczeństwa. Autorka rozpoczyna od analizy struktury najstarszej grupy wiekowej w Polsce z odniesieniem do danych międzynarodowych, prognozując stały wzrost udziału tejże generacji w populacji Polaków w odniesieniu do narastających problemów i wyzwań naszego kraju: starzenia się społeczeństwa, społecznego podziału rasy, niskiego przyrostu naturalnego, sytuacji materialnej, zdrowotnej czy pełnionych ról społecznych seniorów. Drugi rozdział zawiera kilka części, których wspólnym mianownikiem jest wsparcie społeczne. Głównym odniesieniem do działań wpierających rozwój w późnej dorosłości jest w niniejszej pracy polityka społeczna, *silver economy* oraz organizacja życia społeczno-kulturalnego. *Specyfika pracy socjalnej z seniorami – wybrane aspekty*, to tytuł trzeciego rozdziału. Poza opisem klasycznych metod pracy socjalnej z uwzględnieniem specyfiki pracy na rzecz i z osobą starszą, na uwagę zasługują zamieszczone rozważania na temat profesjonalnych kadr gerontologicznych z interesującymi postulatami „edukacji dla starości”.

Kolejne trzy rozdziały są autorstwa Remigiusza J. Kijaka. Dwa pierwsze rozdziały tego autora odnoszą się do wybranych obszarów życia w starości. Pierwszy z nich dotyczy seksualności, a drugi zagrożenia, jakim jest przemoc wobec osób starszych. Rozdział kończący książkę podejmuje tematykę postaw wobec osób starszych oraz poczucia jakości życia samych seniorów. Część poświęcona seksualności osób starszych oparta jest na wielu doniesieniach z badań, przeważnie autorów z zagranicy, gdzie analizy naukowe tej sfery życia ludzi starych są bogatsze niż w Polsce (choć dziwić akurat może brak odwołań do publikacji np. Lwa-Starowicza). Autor odwołuje się także do własnych badań, co należy uznać za wartość tego opracowania. W tekście znaleźć można także odniesienie do życia intymnego z niepełnosprawnością. Piąty rozdział książki podnosi kwestie przemocy wobec osób starszych, jest to typowe kompendium wiedzy na ten temat, oparte na rodzimych i zagranicznych badaniach z tego zakresu. Kończący całą książkę rozdział składa się z dwóch części. Pierwsza traktuje o stylach starzenia się i postawach ludzi starych wobec starości oraz uwarunkowaniach tychże procesów i zachowań. Druga część opisuje postawy wobec starości z perspektywy innych generacji.

Publikacja jest z pewnością cennym materiałem źródłowym dla szerokiego grona odbiorców: pracowników socjalnych, opiekunów osób starszych, studentów nauk społecznych i humanistycznych, a także samych seniorów i tych wszystkich, którzy w praktyce i teorii zajmują się na co dzień seniorami. Treści są niewątpliwie aktualne, oparte na dziełach autorstwa wielu wybitnych polskich i zagranicznych badaczy procesów starzenia się. Pewne wątpliwości budzi struktura pracy (brak wyraźnego klucza) i wybór treści. Dlaczego wyeksponowane zostało życie intymne ludzi starych, a nie np. życie religijne, czy aktywność fizyczna? Dlaczego spośród zagrożeń wybrana została przemoc, a nie inne, dużo bardziej powszechne, jak np. ubóstwo. Jest to jednak prawo autorów, a wybór jest z pewnością konsekwencją ich zainteresowań naukowych, co dowodzą opracowując rzetelnie wybrane obszary życia w starości w swojej publikacji.

**Artur Fabiś**

*Uniwersytet Pedagogiczny im. KEN w Krakowie*

*Wydział Pedagogiczny*

*Instytut Nauk o Wychowaniu*

*Katedra Pedagogiki Społecznej i Andragogiki*

*arturfabis@wp.pl*

**Joanna Nawrocka**  
***Spoleczne doświadczenie starości: stereotypy, postawy, wybory,***  
**Oficyna wydawnicza Impuls, Kraków 2013**

Książka autorstwa Joanny Nawrockiej zatytułowana „Spoleczne doświadczenie starości: stereotypy, postawy, wybory” została wydana w Krakowie w 2013 roku przez Oficynę Wydawniczą „Impuls”. Autorka podejmuje w niej problematykę starości. Na książkę składają się trzy następujące rozdziały: „Czy stara osoba jest starą kobietą, czy starym mężczyzną?”, „Postawy wobec ludzi starych” oraz „Młodzi, starsi, starzy- miłość i satysfakcja z życia”.

Na wagę i aktualność podjętej problematyki wskazuje Autorka we wprowadzeniu. Wstęp niewątpliwie zachęca do lektury książki, ukazując jednocześnie uzasadnienie wyboru eksplorowanej tematyki. Doktor Nawrocka podkreśla, że edukacja społeczeństwa w zakresie gerontologii i psychologii społecznej jest warunkiem koniecznym w skutecznym radzeniu sobie z wyzwaniami starości.

Pierwszy rozdział opisuje badania odnoszące się do społecznego postrzegania seniorów ogółem oraz starszych kobiet i starszych mężczyzn. Na podstawie analizy Autorka wyodrębniła cztery czynniki w modelu określającym osoby starsze. Są to: starczość, destrukcja starości, szlachetność oraz zniedołężnienie i wykluczenie. Tekst przedstawia także pogłębioną analizę pomiędzy poszczególnymi czynnikami a określonymi zmiennymi demograficznymi. Na wagę podjętego działania badawczego wskazuje duża liczba respondentów (807 osób). Należy również zaznaczyć, iż opracowanie to wykracza poza dotychczasową eksplorację kwestii stereotypów dotyczących seniorów.

Kolejna część odnosi się do postaw wobec ludzi starych. Rozdział ten zawiera treści dotyczące ageizmu, telewizyjnej transmisji negatywnych stereotypów dotyczących starości oraz postaw pozytywnych odnoszących się do seniorów. Autorka podkreśla, iż złożoność postaw zależy od różnorodnych czynników, które zawsze oddziałują w przestrzeni społecznej. Także ta część książki ukazuje wyniki badań przeprowadzonych na dużej grupie osób (449). Analiza danych pokazuje trzy główne czynniki określające postawy wobec starości: sprzyjanie potencjałowi, a także wrogi i realistyczne nastawienie.

Trzeci rozdział jest niezwykle wartościowym ukazaniem tematu miłości oraz satysfakcji z życia. Został on napisany przez Joannę Nawrocką oraz Elżbietę Nawrocką i Julię Kamińską. Po przedstawieniu przeglądu literatury Autorki prezentują wyniki badań uzyskane za pomocą trzech narzędzi, do których należały: Kwestionariusz Satysfakcji z Partnera i Związku, Skala Postaw Wobec Miłości i Skala Satysfakcji z Życia. Analiza danych pozwoliła na odkrycie ciekawych zależności między poczuciem satysfakcji ze związku a satysfakcją z życia, jak również korelacji pomiędzy długością związku a preferowanym rodzajem miłości. Bardzo interesującym jest fakt, że artykuł przeczy potocznym przekonaniom, że seniorzy chcą trwać w pełnych poświęceń związkach. Otóż okazuje się,

że wolą oni relacje, które dają radość, ekscytację oraz odmłodnienie. Tym samym opracowanie to niewątpliwie daje szerszy pogląd na temat miłości odnoszonej do seniorów.

Recenzowana książka porusza bardzo ważny problem współczesnego społeczeństwa- opiekę nad niesprawnymi seniorami oraz wielkie obciążenie ich opiekunów. Wymagająca i wyczerpująca opieka na osobami starszymi spada niemal wyłącznie na rodzinę. Autorka w sposób generalizujący (co jest pewnym zarzutem) podaje, że opieka ta „spada na kobiety w fazie średniej dorosłości” (s. 9). Co prawda, stanowią one większość domowych opiekunów, ale nie są nimi wyłącznie. W sytuacji zajmowania się zniechęconymi rodzicami stają się one (lub oni) pielęgniarkami-opiekunkami, pracującymi przez całą dobę siedem dni w tygodniu. Rodzi to różne negatywne konsekwencje, takie jak przemęczenie, czy wręcz wyczerpanie, a także pogarszający się stan zdrowia...

Ostatnie części książki- konkludujące zakończenie, bogata bibliografia, schematy, tabele, wykresy i załączniki - dopełniają całości recenzowanego tekstu. Na końcu zostały umieszczone narzędzia badawcze oraz dane przedstawiające poszczególne etapy procesu badania. Wspomniane załączniki zostały włączone do tekstu przez Autorkę z myślą o studentach, aby zachęcić ich do eksploracji problemu starości.

Uważam, że książka Joanny Nawrockiej jest kompetentnie napisaną pracą, stanowiącą bogate źródło rzetelnych i jednocześnie interesujących danych. Opracowanie zostało starannie przygotowane zarówno pod względem językowym, jak i edytorskim. Na uwagę zasługuje struktura tekstu, która charakteryzuje się wysokim stopniem przejrzystości, przez co jest bardziej przystępna dla czytelnika. Pomimo iż trzy rozdziały stanowią odrębne artykuły, razem nakreślają szerokie tło dla analiz i rozważań nad kwestią starzenia się oraz starości. Niewątpliwie książka ta jest udanym opracowaniem, które wzbogaci wiedzę studentów, osób ze świata nauki oraz innych czytelników zainteresowanych tak istotną problematyką, jaką jest starość.

**Katarzyna Sygulska**

*Uniwersytet Pedagogiczny im. KEN w Krakowie*

*Wydział Pedagogiczny*

*Instytut Nauk o Wychowaniu*

*Katedra Pedagogiki Społecznej i Andragogiki*

*katarzynasygulska@wp.eu*



# Aktualności / News

## Call for papers for the Volume V of the series “Czech-Polish-Slovak studies in andragogy and social gerontology”

Dear Sir/Madam. We sincerely invite you to publish the article of the monograph „*Areas of non-formal and informal learning of seniors*” edited by the international team: Ctibor Határ (Univerzita Konštantína Filozofa v Nitre), Naděžda Špatenková (Univerzita Palackého v Olomouci), Łukasz Tomczyk (Uniwersytet Pedagogiczny w Krakowie).

Scientific reflection on the specifics of non-formal and incidental learning of seniors in such countries as: Czech Republic, Poland and Slovakia area characterized by growing amount of science-methodological achievements (see Határ, 2014). “Learning is, as it is widely-known, a lifelong process. Due to lifelong learning, a person prepares himself/herself for challenges he/she will have to face, he/she may face new tasks; finally, it is learning that leads to the development, so it is a crucial element of a human life in each of its phases” (Fabiś, 2014, p. 76). Education of people in senior age becomes a key not only to gain new competences crucial for full social participation, but also it is a chance for shaping positive habits, knowledge, skills and basics in biological, psychic, intellectual, social and economic areas (see Szarota, 2010, p. 14). Thus, the editors of this volume decided to distinguish a range of significant areas which characterize modern solutions and processes referring to the education of people in late adulthood:

- Non-formal and informal areas of learning of people in late adulthood;
- Specifics of learning and teaching of older people;
- The process of incidental learning in old age;
- Unused areas of learning of older people;
- Institutional solutions for education of seniors in the Visegrad Group countries;
- Senior education quality;

- The role of the non-government organizations in actions for the sake of education of older people;
- Local senior education programmes support;
- Universities of Third Age, Senior clubs, church organization – specifics of the programme offer;
- Challenges faced by senior education in late adulthood;

### **Technical note:**

We wait for Your propositions of articles in the form of a short summary until April 30, 2015. Papers can be prepared in the English, Czech, Polish or Slovak language. All the articles undergo the process of the anonymous review. Editors reserve the right not to accept a paper for print as a result of a negative evaluation. The final version of the monograph has a ISBN number and is located in Google Books, Academia, ResearchGate system and on the series website. Each of the authors shall receive an issue of the publication.

### **Dates:**

**30/04/2015** – final term for sending propositions for papers (abstracts should include: title, keywords, mx. 400 words of the summary, contact address and Name and Last Name)

**15.05.2015** – confirmation of reception of the article proposition

**30.06.2015** – final term for sending the final version of the paper

**30.09.2015** – end of the editorial process

**End of 2015** – planned print term

**Editorial office** : tomczyk\_lukasz@prokonto.pl

### **Until now, the following publications were published in the frame of series:**

- Volume 1 „Starzenie się i starość w dynamicznie zmieniającym się świecie / Stárnutí a stáří v rychle se měnícím světě” red. Katarzyna Walotek-Ściańska, Michał Šerák, Michał Szyszka, Łukasz Tomczyk, Sosonowiec – Praha 2013
  - Volume 2 “Nowe Trendy w edukacji seniorów / Nove trendy ve vzdelavani senioru” red. Miroslav Krystoň, Michał Šerák, Łukasz Tomczyk, *Banská Bystrica – Praha – Kraków 2014*
  - Volume 3 pt. “Společenské, kulturní a vzdělávací aspekty fenoménu aktivního stárnutí / Aktywna starość w perspektywie społeczno-kulturowo-edukacyjnej” red. Štefan Chudý, Łukasz Tomczyk, Olomouc – Kraków 2015
  - Volume 4 – red. Michał Szyszka – during printing process
- Series Website: [www.gerontolodzy.wordpress.com](http://www.gerontolodzy.wordpress.com)

---

**Bibliography:**

- Fabiś A. (2014), *Uczenie się osób starszych*, [w:] A. Chabior, A. Fabiś, J. Wawrzyniak (red.), *Starzenie się i starość w perspektywie pracy socjalnej*, Wyd. Centrum Rozwoju Zasobów Ludzkich, Warszawa.
- Határ C. (2014), *Geragogika*, Univerzita Konštantína Filozofa, Nitra.
- Szarota Z. (2010), *Starzenie i starość w wymiarze instytucjonalnego wsparcia*, Wyd. Uniwersytetu Pedagogicznego, Kraków.

The Series is under the patronage of the Minister of Labour and Social Policy.

